

Claim Submission

Last Modified on 02/27/2024 9:25 am EST

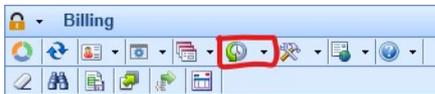
Claim Submission History

The Claim Submission History screen will show previously submitted claim and statement batches, and whether or not they have been picked up by the clearinghouse or statement vendor.

1. From within the Billing Module, select Claim Submission from the Navigation Pane.



2. Click on the History button on the toolbar to change from Submission Summary to Submission History.



3. Enter a date range in the Submission Date fields. If you want to narrow down the search, you can select either the Batch Type (claims, extract, statements) or Billing Type (paper or electronic). You may want to increase the Max Rows prior to searching. Click the Binoculars icon to search.



4. A list of batches (based on your search criteria) will be displayed. If any of the fields read N/A, the batch has not yet been picked up by the clearinghouse or statement vendor.

A screenshot of the Billing Submission History table. The table displays a list of batches with columns for ID, Prepared Date, Process Date, Batch Type, Billing Type, Created By, Total Claims, BillingMD Failed, BillingMD Passed, EDI Failed, and EDI Passed. The table shows 8 rows of data.

ID	Prepared Date	Process Date	Batch Type	Billing Type	Created By	Total Claims	BillingMD Failed	BillingMD Passed	EDI Failed	EDI Passed
27879	01/02/2019	01/02/2019	Claims	Electronic	lamanda	1	0	1	0	1
27883	01/02/2019	01/02/2019	Claims	Electronic	lamanda	1	0	1	0	1
27883	01/02/2019	01/02/2019	Claims	Electronic	mjohnson	6	2	4	2	4
27883	01/02/2019	01/02/2019	Claims	Electronic	ritale	12	6	6	6	6
27883	01/02/2019	01/02/2019	Claims	Electronic	momartin	13	5	8	5	8
27883	01/02/2019	01/02/2019	Claims	Electronic	jmuhammad	10	2	8	2	8
27883	01/02/2019	01/02/2019	Claims	Electronic	lamanda	1	1	0	N/A	N/A
27884	01/02/2019	01/02/2019	Claims	Electronic	mjohnson	13	6	7	6	7

5. Each of the icons on the left mean a different thing:

	Awaiting payer response to claim submission
	Payer has responded to claim submission
	HCFA Forms have been printed
	Submission was in error
	Statements have been sent (electronically to statement vendor)
	Statements have been printed

6. Click the Pad/Pencil icon to switch back to the Submission Summary screen to view unsubmitted batches.



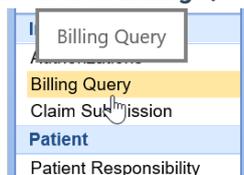
Changing a CPT Code & Resending a Claim

How to Change a CPT Code on a Claim and Submit the Corrected Claim

1. Go To Billing Portal.



2. Click on Billing Query.



3. Search for the Claim you wish to edit.

Patient ✕

Missing Signature ↗

Chart # EOB ID

First Name Last Name

[{{More}}](#)

4. Double click on the claim to edit.

#	+	Claim	DOS	Submission	Status	Billing	Balance	Chart	Patient Name	Guarantor	
1	<input checked="" type="checkbox"/>	26799	03/03/20		Done	P	\$150.00	\$150.00	9328	Test, Patient	Test, Patient
2	<input checked="" type="checkbox"/>	26798	03/31/20		Open - Electr...	P	\$-5.00	\$15.00	9328	Test, Patient	Test, Patient

5. The claim will open, Right click on the service line and CPT code you wish to change.

The screenshot shows a software interface with a table titled "Procedures and Diagnoses (1)". The table has columns for "#", "Service Date" (From and To), "Procedure", "POS", and "Units".

#	Service Date		Procedure	POS	Units
	From	To			
1	03/03/2020	03/03/2020	95165	11	10.00
2	03/03/2020	03/03/2020			

Below the table is a button labeled "+ Add New Item". To the right of the table, a context menu is open, listing options: Clear, Reset, Search, Delete, Recovery, Up, Down, Additional, Authorization, NDC, and Comment. The "Delete" option is highlighted.

Below the table is a section titled "Additional Information" with fields for Admission, Discharge, Initial, and Onset, each with a calendar icon. There is also a "Miscellaneous" link.

6. Click Delete.

7. Click Yes.

The screenshot shows a dialog box titled "Delete Procedure". The text inside the dialog box asks: "Are you sure you wish to delete the following procedure?". Below this text, it lists: "Line #: 1", "Date: 03/03/2020", and "Code: 95165". At the bottom of the dialog box, there are two buttons: "Yes" and "No". The "Yes" button is highlighted with a yellow box, and a mouse cursor is pointing at it.

8. Type in the CPT code you want to be in the claim.

The screenshot shows the same software interface as in step 5, but now the "Procedures and Diagnoses (1)" table has been updated. The first row now shows: "# 1", "Service Date From: 04/22/2020", "Service Date To: 04/22/2020", "Procedure: 99213", "POS: [dropdown arrow]", and "Units: [empty]". The "+ Add New Item" button is still present below the table.

9. Click Save.

1 entry for Claim #26

The screenshot shows a button labeled "Save" with a floppy disk icon. A mouse cursor is pointing at the button.

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10. You may resend the claim now if it has not already been billed> Follow to next steps below to send corrected claim:

11. If you need to resend a corrected claim.

Then click on add information on the lower left of the claim entry screen.

[+ Add Information](#)

12. Click on Numbers, Codes, and Identifiers.

- Accident and Related Causes
- Dates
- Durable Medical Equipment (DME)
- Early and Periodic Screens, Diagnosis & Treatment
- Numbers, Codes and Identifiers**
- Other Miscellaneous Values
- Documentation**
 - Narrative
 - Filing Information
 - Reporting Information
- Health Care Information**

13. Put in resubmission Code of 7

14. And add the claim number as depicted below.

Additional Values for Claim 26799

Numbers, Codes and Identifiers

Medical Record	<input type="text"/>
Original Reference	<input type="text" value="1234534"/> <input type="button" value="X"/>
Investigational Device	<input type="text"/>
Mammography	<input type="text"/>
Resubmission Code	<input type="text" value="7"/>
Medicaid Code	<input type="text"/>
Service Authorization	<input type="text"/>
Delay Reason	<input type="text"/>
Demonstration Project ID	<input type="text"/>
Homebound	<input type="text"/>

15. Now you can send a corrected claim following claim submission steps.