

CLAIMS/BILLING TAB



Your claim submissions are managed in the **Claims/Billing Tab**. Claims can be printed, deleted, submitted or un-submitted here, and rejected or failed claims can be repaired and resubmitted.

CLAIMS/BILLING TAB


The claims will appear on the list in order of **Date Created**. The search criteria at the top of the list will assist you in locating past claims.

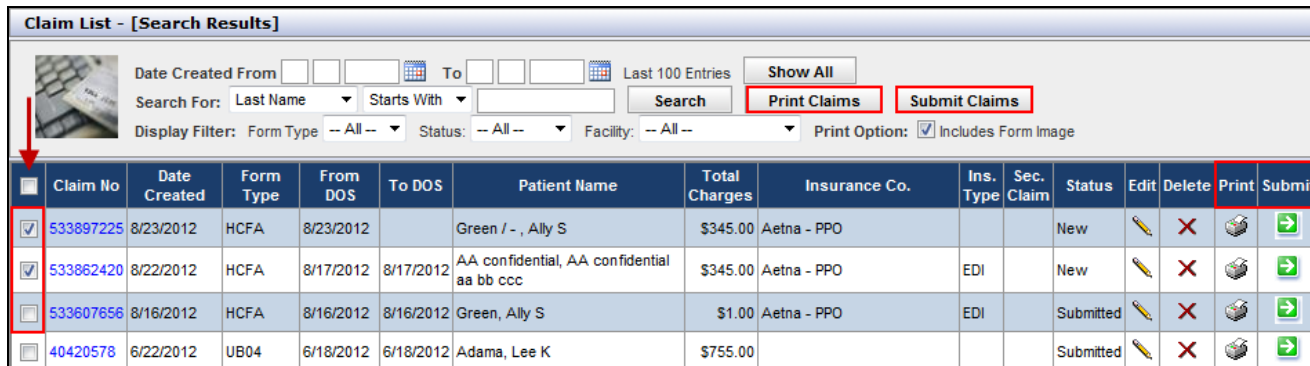
The Claim List will display the **Status** of your claims. If the status of your claim is “New,” that indicates it has not yet been submitted. You will need to manually submit the claim for processing, or print it in order to mail it. You may set a preference to Auto-Submit your claims in **Manage Office Tab>Preferences** to avoid this step. The claims would then automatically submit as soon as they are created.

- ◆ **Claim No-** Click on the Claim number to view the completed claim form. This is a unique identifying number for the claim in Practice Mate.
- ◆ **Date Created-** Date the claim was created.
- ◆ **Form Type-** Displays what type of form the claim is. Ex: HCFA, UB04, etc.
- ◆ **From DOS-** From Date of Service.
- ◆ **To DOS-** To Date of Service.
- ◆ **Total Charges-** Charges for the visit/services that are being billed.
- ◆ **Insurance Co-** Displays the insurance company listed on the claim.
- ◆ **Ins. Type-** This column does not affect the method in which the claim is sent, it is simply an indicator.
 - (EDI) Electronic Data Interchange- For claims set to be submitted electronically.
 - Paper- For claims set to be submitted by a paper claim form.
 - Blank- If there is no **Ins. Type** label, the claim was fixed in the Repairable Claim link.
- ◆ **Sec. Claim-** Indicates whether this claim is for a secondary insurance company.
- ◆ **Status-** Indicates whether the claim is new, submitted, or printed.
- ◆ **Edit-** Allows you to open the claim form and make any necessary changes.
- ◆ **Delete-** Delete the claim from the records.
- ◆ **Print-** Allows you to print the claim form.
- ◆ **Submit-** Submit the claim electronically.

Claim No	Date Created	Form Type	From DOS	To DOS	Patient Name	Total Charges	Insurance Co.	Ins. Type	Sec. Claim	Status	Edit	Delete	Print	Submit
533897225	8/23/2012	HCFA	8/23/2012		Green / - , Ally S	\$345.00	Aetna - PPO		Y	New				
533862420	8/22/2012	HCFA	8/17/2012	8/17/2012	AA confidential, AA confidential aa bb ccc	\$345.00	Aetna - PPO	EDI		New				
533607656	8/16/2012	HCFA	8/16/2012	8/16/2012	Green, Ally S	\$1.00	Aetna - PPO	EDI		Submitted				
40420578	6/22/2012	UB04	6/18/2012	6/18/2012	Adama, Lee K	\$755.00				Printed				

Note: To set an insurance to EDI or Paper, go to **Manage Office>Insurances**, and select EDI or Paper in the Billing Type drop down.

You can submit the claims in a batch by selecting the claims with a check mark in the left column and clicking the **Submit Claims** button above the list. You may select multiple claims, or use the check box in the column header to check all the claims on the page. You can also submit the claims one by one by clicking the icon in the **Submit** column, , for that claim. The procedure is the same to print the claims in a batch, or one by one. When you submit claims electronically, they will go to **Claims Awaiting Batch** for processing by Office Ally.



Claim List - [Search Results]

Date Created From [] To [] Last 100 Entries [Show All](#)

Search For: Last Name Starts With Search [Print Claims](#) [Submit Claims](#)

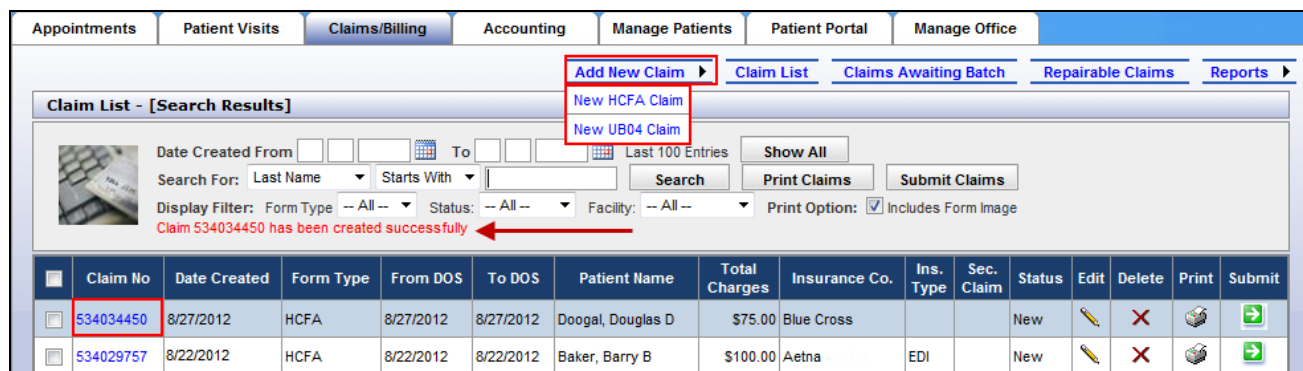
Display Filter: Form Type -- All -- Status: -- All -- Facility: -- All -- Print Option: Includes Form Image

<input type="checkbox"/>	Claim No	Date Created	Form Type	From DOS	To DOS	Patient Name	Total Charges	Insurance Co.	Ins. Type	Sec. Claim	Status	Edit	Delete	Print	Submit
<input checked="" type="checkbox"/>	533897225	8/23/2012	HCFA	8/23/2012		Green / - , Ally S	\$345.00	Aetna - PPO			New				
<input checked="" type="checkbox"/>	533862420	8/22/2012	HCFA	8/17/2012	8/17/2012	AA confidential, AA confidential aa bb ccc	\$345.00	Aetna - PPO	EDI		New				
<input type="checkbox"/>	533607656	8/16/2012	HCFA	8/16/2012	8/16/2012	Green, Ally S	\$1.00	Aetna - PPO	EDI		Submitted				
<input type="checkbox"/>	40420578	6/22/2012	UB04	6/18/2012	6/18/2012	Adama, Lee K	\$755.00				Submitted				

Claims/Billing>Add New Claim

Hover your mouse over the **Add New Claim** link. Choose a claim form to create. This will open the page to the **New Claim** screen for your form. The form will look like a paper claim form, with the same layout and boxes. Fill out the form as you normally would. When you have finished, click **Update** at the bottom of the screen. Your new claim will appear on your Claim List, with a confirmation message.

Note: Claims created this way will not automatically have Patient Visits attached, which will affect posting payments in the **Accounting Tab**.



Appointments Patient Visits **Claims/Billing** Accounting Manage Patients Patient Portal Manage Office

[Add New Claim](#) [Claim List](#) [Claims Awaiting Batch](#) [Repairable Claims](#) [Reports](#)

Claim List - [Search Results]

Date Created From [] To [] Last 100 Entries [Show All](#)

Search For: Last Name Starts With Search [Print Claims](#) [Submit Claims](#)

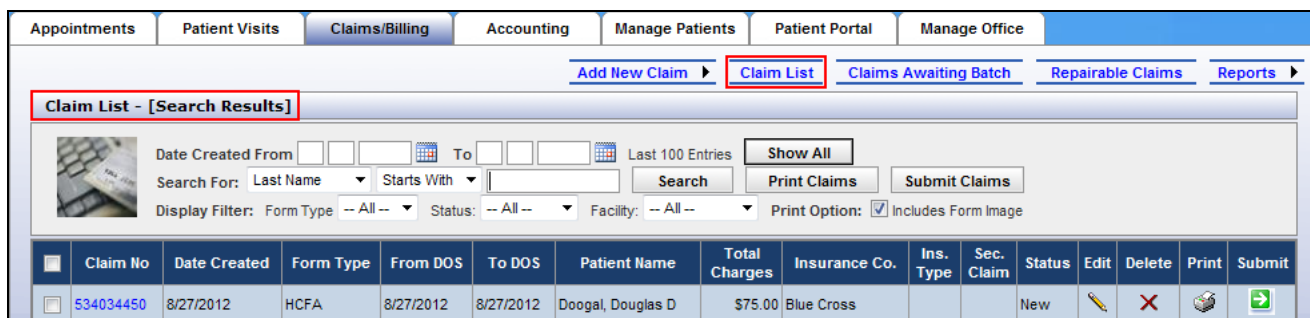
Display Filter: Form Type -- All -- Status: -- All -- Facility: -- All -- Print Option: Includes Form Image

Claim 534034450 has been created successfully

<input type="checkbox"/>	Claim No	Date Created	Form Type	From DOS	To DOS	Patient Name	Total Charges	Insurance Co.	Ins. Type	Sec. Claim	Status	Edit	Delete	Print	Submit
<input type="checkbox"/>	534034450	8/27/2012	HCFA	8/27/2012	8/27/2012	Doogal, Douglas D	\$75.00	Blue Cross			New				
<input type="checkbox"/>	534029757	8/22/2012	HCFA	8/22/2012	8/22/2012	Baker, Barry B	\$100.00	Aetna	EDI		New				

Claims/Billing Tab>Claim List

To get back to the main default page for the **Claims/Billing Tab**, click the **Claim List** link. This will display the main Claim List page if you had navigated away.



Appointments Patient Visits **Claims/Billing** Accounting Manage Patients Patient Portal Manage Office

[Add New Claim](#) [Claim List](#) [Claims Awaiting Batch](#) [Repairable Claims](#) [Reports](#)

Claim List - [Search Results]


Date Created From [] To [] Last 100 Entries [Show All](#)

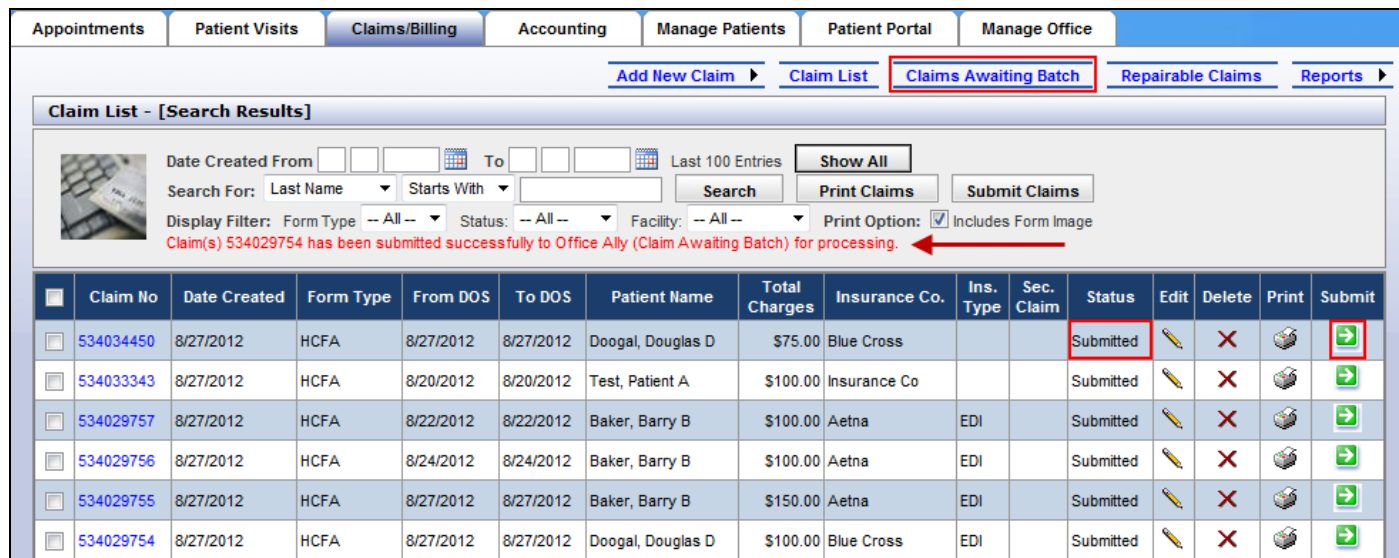
Search For: Last Name Starts With Search [Print Claims](#) [Submit Claims](#)

Display Filter: Form Type -- All -- Status: -- All -- Facility: -- All -- Print Option: Includes Form Image

<input type="checkbox"/>	Claim No	Date Created	Form Type	From DOS	To DOS	Patient Name	Total Charges	Insurance Co.	Ins. Type	Sec. Claim	Status	Edit	Delete	Print	Submit
<input type="checkbox"/>	534034450	8/27/2012	HCFA	8/27/2012	8/27/2012	Doogal, Douglas D	\$75.00	Blue Cross			New				

Claims/Billing Tab > Claims Awaiting Batch

When you click the icon in the **Submit** column, , you will get a confirmation message that your claim has been submitted to Office Ally, and the **Status** will change from “New” to “Submitted.” To view the submitted claims, click on the **Claims Awaiting Batch** link.

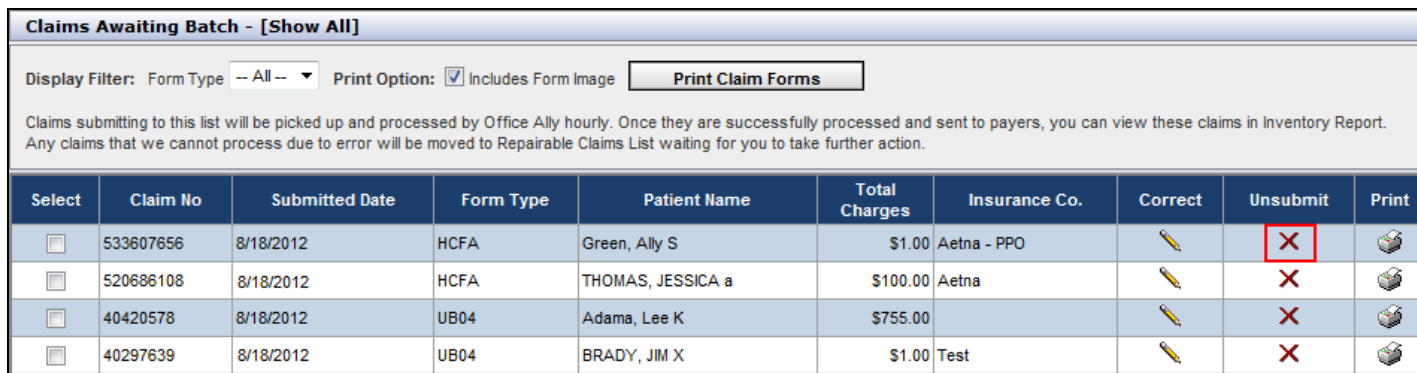


Claim No	Date Created	Form Type	From DOS	To DOS	Patient Name	Total Charges	Insurance Co.	Ins. Type	Sec. Claim	Status	Edit	Delete	Print	Submit
534034450	8/27/2012	HCFA	8/27/2012	8/27/2012	Doogal, Douglas D	\$75.00	Blue Cross			Submitted				
534033343	8/27/2012	HCFA	8/20/2012	8/20/2012	Test, Patient A	\$100.00	Insurance Co			Submitted				
534029757	8/27/2012	HCFA	8/22/2012	8/22/2012	Baker, Barry B	\$100.00	Aetna	EDI		Submitted				
534029756	8/27/2012	HCFA	8/24/2012	8/24/2012	Baker, Barry B	\$100.00	Aetna	EDI		Submitted				
534029755	8/27/2012	HCFA	8/27/2012	8/27/2012	Baker, Barry B	\$150.00	Aetna	EDI		Submitted				
534029754	8/27/2012	HCFA	8/27/2012	8/27/2012	Doogal, Douglas D	\$100.00	Blue Cross	EDI		Submitted				

Claims that have been submitted to Office Ally go to the **Claims Awaiting Batch** section. This is the holding section for the claims as they wait to be retrieved by Office Ally’s servers to be submitted to the insurance payers. The claims can be in **Claims Awaiting Batch** anywhere from 1 minute to 3 hours, depending on the rotation of the servers.

If you find you need to make corrections to a claim while it is in **Claims Awaiting Batch**, before it has been retrieved, click on the icon in the **Unsubmit** column. This will remove the claim from **Claims Awaiting Batch**, allowing you to make your corrections, and resubmit.

Note: If the claims have already been retrieved and submitted by Office Ally, you can call Customer Service at 866-575-4120 Option 1 to try and stop the transaction immediately after retrieval. Otherwise, if the claim has already been submitted to the insurance payer, you will need to wait for the claim with the mistake to be rejected, and use the **Reparable Claims** link to correct and resubmit the claim.

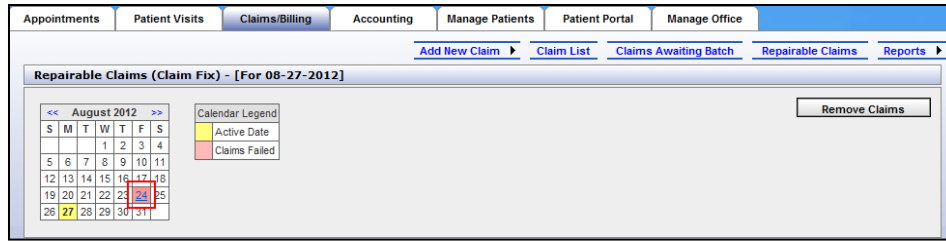


Select	Claim No	Submitted Date	Form Type	Patient Name	Total Charges	Insurance Co.	Correct	Unsubmit	Print
<input type="checkbox"/>	533607656	8/18/2012	HCFA	Green, Ally S	\$1.00	Aetna - PPO			
<input type="checkbox"/>	520686108	8/18/2012	HCFA	THOMAS, JESSICA a	\$100.00	Aetna			
<input type="checkbox"/>	40420578	8/18/2012	UB04	Adama, Lee K	\$755.00				
<input type="checkbox"/>	40297639	8/18/2012	UB04	BRADY, JIM X	\$1.00	Test			

If you click the icon in the **Unsubmit** column, you will get a pop up to confirm the removal from **Claims Awaiting Batch**. Click **OK** to remove the claim. A confirmation message will appear above the list.

Claims/Billing Tab>Repairable Claims

Once the claims have been processed by Office Ally, you can view claims needing repair by clicking on the Repairable Claims link. A calendar will appear. A date highlighted in pink indicates that there are claims for that date requiring repair and resubmission to Office Ally. It is advisable that these claims be viewed and repaired on a daily basis.



To repair/fix a claim that has failed, click on the pink date, and a list of the claims that failed for that day will appear. An error code and error description will be listed for each failed claim. Click the correct button next to the error description, and the form for that patient will appear on your screen. The error code and description will be listed again in the upper left hand corner of the screen. Scroll down to the appropriate field where the error occurred and make the correction.

Once you have corrected the error, scroll down to the bottom of the form and click **Update**. The claim will be reprocessed and sent to the insurance company for payment and will immediately come out of Claim Fix. In this calendar, once all claims for a given day have been corrected and reprocessed, the calendar date will turn white again.

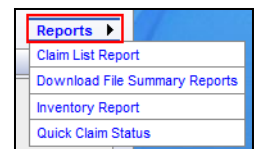
From any screen in Practice Mate, you will see a **New Repairable Claims** link in the upper right corner of your screen, where the account information is displayed. If there are claims that need repair that have not been viewed, the link will display a number. Clicking on the link will take you to the repairable claims that have not already been viewed so you can correct them.



Note: A (0) displayed by this link does not mean there are no claims waiting to be repaired; it simply means there are **no new claims** waiting to be repaired.

Claims/Billing Tab>Reports

Reports are accessed by hovering the mouse on the **Reports** link, and selecting the desired report.



Claims/Billing Tab>Reports> Claim List Report

The Claim List Report is a list of all claims generated through Office Ally sorted by date and insurance company. It includes the date created, patients name, insurance name and total charges. This report may be printed or saved in PDF or Excel format.

Claims/Billing Tab>Reports>Download File Summary Reports

Within 24 hours of submitting your claim to Office Ally, a claim notification will be sent to you, via email, advising that Office Ally has processed and sent the claim on to the payer. This report lists the status of all claims received by Office Ally, and acts as your receipt that your claims have been entered into Office Ally's system. The report gives you the total number of claims you submitted for any given day, lists how many of the claims were accepted and/or failed by Office Ally, and lists the File ID# of the batch, which can be used to track your claims.

If there is a report available to view, the calendar date will turn pink. Click on the pink date to open the list of reports, and click **View** to open each individual claim. You can print or save the report, or refer back to the Download File Summary Reports calendar for 1 year. Once all the reports on any given day have been viewed, the calendar date will turn blue. A sample format is below.

Download File Summary Reports

<< August 2012 >>

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Calendar Legend

- Active Date
- Report(s) To Be Viewed
- Report(s) Viewed

Reports for 8/18/2012

Payer	Form Type	File ID	OA FileName	Accepted	Pending	Failed	Total	Download/View
MULTI	HCFA	113755493	113755493_TestUpload.txt	0	0	0	0	View
MULTI	HCFA	113753659	113753659_TestUpload.txt	0	0	0	0	View

You will also receive EDI Status reports from many of the Payers which acknowledge that the insurance company received your claim. These reports are labeled as “EDI Status Report” and are listed as a Payer response.

Claims/Billing Tab>Reports>Inventory Report

The Inventory Report is a search engine that you can use to locate and pull up reports on claims submitted through Office Ally. Various filters let you be as broad or as specific as needed in searching the records. Once you have selected your criteria, click the **Search** button and your results will be listed. This report may be exported to Excel.

Claim Inventory Report

Search Options

Select Payer: --- All Payers ---

Form Type: HCFA UB04 ADA

From Date: 6/29/2012 To Date: (mm/dd/yyyy) 8/28/2012

Status: -- All --

Error Code: --- Select Type Of Error ---

Exclude Error: --- Select Type Of Error ---

Date Type: DOS Upload Processed

Tax ID: State License ID: Insured ID:

Patient Last Name: Patient First Name: Patient Account No:

File ID: Claim ID: Submission Type: -- ALL --

CPT Code: Diagnosis Code: Sort By:

Detail Report Summary Report

Search
Export To Excel

Claims/Billing Tab>Reports>Quick Claim Status

The Quick Claim Status report provides a summary of claims Accepted, Pending, or Rejected for a given period of time. This report can be run for all payers or for a specific payer only. This report may be viewed, but not exported.