

How to bulk submit claims

07/24/2024 5:05 pm EDT

If you have multiple claims needing to be sent to the same payer, you can save yourself some time and keystrokes by submitting them altogether.

Note: Bulk submitting claims is for the *initial* submission of claims. It cannot be used to re-submit claims.

1) Hover over the **Billing** Tab and select



2) Check the boxes corresponding to the appointments that need to be submitted to the insurance company. You can identify these claims by sorting on a specific billing status, date of service, payer ID, or office.

<input checked="" type="checkbox"/>	RCM	Info	Claim ID	Patient	Date of Service	Office	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Bal	Claim Bal	Exp Reimbr	Ins 1
Totals:							\$769,409.21	\$582,234.55	\$187,174.66	\$364,968.57	\$0.00	\$13,875.01	\$136,150.58	\$67,240.39	\$203,390.97	\$22,600.00	
<input checked="" type="checkbox"/>			31434878		6/16/2016 05:00PM		\$20.22	\$20.22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.22	\$20.22	\$0.00	
<input checked="" type="checkbox"/>			31412576		6/16/2016 03:00PM		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	united healthcare
<input checked="" type="checkbox"/>			31412574		6/16/2016 01:00PM		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	united healthcare
<input checked="" type="checkbox"/>			31434880		6/16/2016 11:00AM		\$140.45	\$140.45	\$0.00	\$0.00	\$0.00	\$0.00	\$140.45	\$0.00	\$140.45	\$0.00	Cigna
<input checked="" type="checkbox"/>			31412572		6/16/2016 10:00AM		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	UnitedHealthcare
<input checked="" type="checkbox"/>			31364488		6/15/2016 03:00PM		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	united healthcare
<input checked="" type="checkbox"/>			31362418		6/15/2016 12:00PM		\$274.65	\$224.65	\$50.00	\$20.00	\$0.00	\$0.00	\$125.95	\$78.70	\$204.65	\$0.00	UMR (formerly Harrington Benefit Services - Westerville)
<input checked="" type="checkbox"/>			31362420		6/15/2016 11:00AM		\$3,830.56	\$3,830.56	\$0.00	\$0.00	\$0.00	\$0.00	\$3,830.56	\$0.00	\$3,830.56	\$0.00	Cigna
<input checked="" type="checkbox"/>			31364486		6/15/2016 10:00AM		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	UnitedHealthcare

3) Click on the **Batch Status Change** drop-down and choose **Bill Insurance**

Live Claims Feed

Select All Offices Select None Gospel Room All Jones Rd All Surgery Room All

Claim St: 0 809 673 All Billing St: All Appt Profiles: All TFL Warning

Patient: Payer Name: Payer ID: drc claim #: 06/16/2015 - 06/16/2016 Clinical Note:

Open window in new tab Check All Clear Update Filter

Batch Status Change Export to File Custom Export Display + Schedule Internal 1 - 100 OF 1,482

Date of Service	Office	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Bal	Claim Bal	Exp Reimbr	Ins 1
Totals:		\$769,409.21	\$582,234.55	\$187,174.66	\$364,968.57	\$0.00	\$13,875.01	\$136,150.58	\$67,240.39	\$203,390.97	\$22,600.00	
6/16/2016 12:00PM	Gospel Room	\$20.22	\$20.22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.22	\$20.22	\$0.00	
6/16/2016 12:00PM	Surgery Room	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	united healthcare
6/16/2016 12:00PM	Surgery Room	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	united healthcare
6/16/2016 12:00AM	Gospel Room	\$140.45	\$140.45	\$0.00	\$0.00	\$0.00	\$0.00	\$140.45	\$0.00	\$140.45	\$0.00	Cigna
6/16/2016 12:00AM	Surgery Room	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	UnitedHealthcare
6/15/2016 12:00AM	Surgery Room	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	united healthcare

4) The claims will be transmitted to the clearinghouse at a predetermined time, depending on the clearinghouse. Batches are sent 7 days a week, regardless of holidays or weekends.