How does Live Claims Feed work?

07/24/2024 4:35 pm EDT

The Live Claims Feed allows you to see and filter your claims in multiple ways to make them easier to work. Let's look at each filter and the function it allows:

1. Hover over the Billing tab and select Live Claims Feed:

Billing
BILLING
Billing Summary
Live Claims Feed
Patient Payments
Day Sheet
Transactions
Remittance Reports
Unmatched ERAs
Insurance Credit Card Payments
Accounts Receivable
Patient Statements
Product/Procedure
Patient Balance Ledger
Fee Schedule
Underpaid Items
Adjustment Master
Sales Tax
Billing Log

2. Office filter:

As the default, all of your offices will be selected when you sign into the Live Claims Feed. You can change this to view only a specific office (or offices) by first clicking on "Select None" on the top left. This will undo the default setting. You can then use the drop-down next to each office you would like to view and select **All Exam Rooms** or specific ones within each office and click on the blue **Update Filter**:

Live Claims Feed								
Select All Offices Select None	C new office All - D	Inpatient Hospital All -	Primary Office All -					
laim Type All - Claim St €	All Exam Rooms	ng St: All - Appt Profile	es: All - Calculate Counts	What's this?	TFL Warning 🗌			
atient 🔹 Payer Nan	Exam 1 Exam 2	drc claim # 07.	/05/2022 - 08/05/2022	Clinical Note	~			
Open window in new tab 🛛	 Exam 2 Exam 3 Exam 4 					Check All	Clear	Update Filte
itch Status Change - 🔒 Export t	Inactive Exam Rooms	port Display - + S	chedule 🔅 Internal 🗸					PAG

3. Claim Status filter: Filter the claims by selecting the status (or statuses) that you would like to view > Click on **Update Filter.** All will be selected as a default, but you can update it by clicking on just the status/statuses you want to view.

Select All Offices S	elect None C new office All -	D Inpatien	t Hospit	al All 👻	Prim	ary Off	ice All	•												
Claim Type All -	Claim St 💿 🖸 🖸 🖨 All 🗸	Billing St: A	•] [Appt Prof	files: All	•	Calcul	ate Co	ounts	0 Wł	nat's this	? TFL	Warr	ning 🗌						
Patient 🗸	Z 💿 All Statuses	d	rc claim	# 0	07/05/20	22	- 0	8/05/2	2022	Clin	ical Not	e		~						
Open window in new t Batch Status Change -	 ERA Received In Process at Clearinghouse In Process at Payer Payer Acknowledged 	n Export	Display	y-]+	Schedu	ıle	¢ Inte	rnal -							Cł	heck All	Cle	ar	Update F	Filter PAGE
Claim Info ID Patient	 Coordination of Benefits Other Rejected ERA Denied Not Submitted 	g Billing Provider			-	Paid		Paid	ins Bai	Pt Line Item Bal	Claim Bal	Exp Reimbr	1	Ins 1 Status		Ins 2 Status	First EDI	Last EDI	Service Notes	Billin
	Missing Information	Totals:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00								
		Totals:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00								

4. Billing Status filter: Filter the claims by selecting a specific status or all the statuses > click on Update Filter:

Live Claims Feed	
Select All Offices Select None C new office All	D Inpatient Hospital All - Primary Office All -
Claim Type All - Claim St 💿 🕤 🕤 All -	Billing St: All Appt Profiles: All Calculate Counts What's this? TFL Warning
Patient Payer Name Payer	✓ All Statuses 022 - 08/05/2022 Clinical Note ✓
Open window in new tab	Image: Settled Check All Clear Update Filter
Batch Status Change ▼ Bxport to File ▼ Cu	Z S Balance Due Jle ↓ Internal ▼ Z Scrubbing Error ↓
	C Other Line
Claim Date of Supervise Info ID Patient Service Office Provider	Coding Clarification Paid Paid Paid Bal Bal Bal Bal Reimbr 1 Status 2 Status EDI EDI Notes Notes
	Z O Ready to Code
	Image: Solution of the second secon

5. Appointment Profiles filter: Pull up the claims by selecting a specific profile or all the profiles > click on **Update Filter**.

Sele	ect All O	fices	Select No	ne	C new offi	ce All -	D Inpatient	t Hosp	oital All	• Primary	/ Office All -												
Clai	m Type	All -	Claim	St 🖸		All - B	illing St: Al	•	Appt F	rofiles: All -	Calculate	Counts	() Wh	at's this	7 TFL	Warn	ing 🗌						
Patie	nt	4	Paye	er Name		Payer ID	dr	c clair	🗹 All	Profiles		2022	Clini	cal Not	e 🦳		~						
		ow in new Change -		kport to	File 🔻	🖺 Custom	Export	Disp		No Profile or Back Pain New Patient New Patient	Visit							Ch	eck All	Cle	ar	Update F	Filter PAGE
Infe	Claim o ID	Patient	Date of Service	Office	Provider	Supervising Provider	Billing Provider	Bille		New Patient ^V New Patient ^V Followup Visi Followup Visi	Visit t	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status		Ins 2 Status	First		Service Notes	Billi
							Totals:	\$0.0		Followup Visi		\$0.00	\$0.00	\$0.00	\$0.00								
							Totals:	\$0.0		Followup Visi Foot Pain New Patient	t	\$0.00	\$0.00	\$0.00	\$0.00								
										Existing Patie Resch Appt Walk-in Walt List	ent												

6. TFL Warning check box: Once you update the timely filing period for an insurance under the Billing > Insurance Setup screen, you can pull up those insurance claims by placing a checkmark on this box. This will help you identify claims that may be close to their timely filing limit so they can be worked on/submitted.

Live Claims Feed					
Select All Offices Se	c new office All -	D Inpatient Hospital All - Primar	Office All -		
Claim Type All -	Claim St	Billing St: All - Appt Profiles: All -	Calculate Counts (1)	What's this? TFL Warning	
Patient	Payer Name Payer II	07/05/2022	- 08/05/2022 C	Clinical Note	
Open window in new ta	tab 🗌				Check All Clear Update Filter

7. Patient search: Pull up the claims for a specific patient by entering the patient's name or chart id in the search field and selecting from the drop-down:

Live Claims Feed																		
Select All Offices Select None C new office All - D Inpatie	nt Hospit	al All 🔻	Prim	ary Off	fice Al	•												
Claim Type All - Claim St 💿 💿 💿 All - Billing St: A	• IL	Appt Prof	files: All	•	Calcul	ate Co	unts	0 Wh	at's this	? TFL	Warni	ng 🗌						
Patient Payer Name Payer ID C	irc claim	# 0)7/05/20)22	- [08/05/2	022	Clin	cal Not	•		~						
Open window in new tab													CI	heck All	Cle	ar	Update F	ilter
Batch Status Change ▼ B Export to File ▼ Custom Export	Displa	y - +	Schedu	Jie	Inte	rnal -											P	AGE 1
								Pt Line										
Claim Date of Supervising Billing Info ID Patient Service Office Provider Provider Provider	Billed	Allowed	Adjmt		Ins 2 Paid		Ins Bal	Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status		Ins 2 Status	First EDI	Last EDI	Service Notes	Billing Notes
Totals	: \$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00								
Totals	: \$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00								

8. Payer Name and Payer ID search: Pull up the claims for a specific payer by either entering the payer name in the Payer name field or entering the payer ID in the Payer ID field > click on Update Filter.

Live Claims Feed	
Select All Offices Select None C new office All D Inpatient Hospital All Primary Office All	
Claim Type All - Claim St 💿 💿 💿 All - Billing St: All - Appt Profiles: All - Calculate Counts 🚯 What's this? TFL Warning 🗆	
Patient Payer Name Payer ID drc claim # 07/05/2022 - 08/05/2022 Clinical Note	
Open window in new tab	Check All Clear Update Filter

9. drc claim #: This 15-digit number is system generated, and will print in box 26 on the HCFA-1500 form or in box 3B on the UB04 institutional form. The number is also usually found on ERAs or EOBs as the patient claim/account number.

Live Claims Fe	ed					
Select All Offices	Select None C new o	office All - D In	patient Hospital All - Primary	Office All -		
Claim Type All -	Claim St 💿 🕞 🗧	All - Billing	g St: All ▼ Appt Profiles: All ▼	Calculate Counts	What's this?	TFL Warning 🗌
Patient	Payer Name	Payer ID	drc claim #	-	Clinical Note	~
Open window in new	tab 🗌				Check All	Clear Update Filter

10. Date range search: Pull up the claims by entering the desired date range (day/month/year). Our system will show the claims for the last 30 days by default.

Live Claims Feed	
Select All Offices Select None C new office All D Inpatient Hospital All Primary Office All	
Claim Type All - Claim St 💿 🕤 🕤 All - Billing St: All - Appt Profiles: All - Calculate Counts 🚯 What's this? TFL Warning 🗆	
Patient Payer Name Image: Comparison of the state of the s	
Open window in new tab	Check All Clear Update Filter

11. Clinical note filter: Filter the claims by Locked and Not Locked notes > **Update Filter**.

Live Claims Feed	
Select All Offices Select None C new office All D Inpatient Hospital All Primary Office All	
Claim Type All - Claim St 😔 😌 😋 All - Billing St: All - Appt Profiles: All - Calculate Counts	What's this? TFL Warning
Patient Payer Name Payer ID drc claim # From - To	Clinical Note 🗸
Open window in new tab	Locked Not Locked Check All Clear Update Filter

12. Open Window in a new tab: Check off this box to open the window of appointment and patient in a new tab.

Live Claims Feed	
Select All Offices Select None C new office All D Inpatient Hospital All Primary Office All	
Claim Type All - Claim St 💿 💿 🙃 All - Billing St: All - Appt Profiles: All - Calculate Counts 🛛 What's this? TFL Warning 🗆	
Patient 🐳 Payer Name 📲 Payer ID drc claim # From - To Clinical Note 🗸	
Open window in new tab	Check All Clear Update Filter

13. Batch Status Change: It allows you to change the billing status for your claims in bulk. You can either filter the claims by a patient or specific insurance or date range and check off the box on the left-hand side beside the claim ID to select the claims. Once done, select the billing status from the drop-down of what status you would like to move the claims to. The system will give you a pop-up

and ask you to confirm the move. You will need to type **CONFIRM** in all caps for the system to move the claims.

Live	Claims Fe	eed																			
Selec	t All Offices	Selec	t None	C new c	office All	D Inpati	ent Hospit	al All 🗸	Primary (Office A											
Claim	Type All -	С	aim St 🧧	000	All -	Billing St:	All -	Appt Profil	es: All -	Calcu	late Co	ounts	6 W	hat's this?	TFL	Warning 🗌]				
Patient I Payer Name I Payer ID drc claim # - Clinical Note -																					
Open	window in r	new tab															Che	ck All Cl	ear Upda	ate Fi	ilter
Batch S	Status Chanç	ne 🗸	🔒 Export t	o File	- B Cu	stom Export	Display	/- + 5	Schedule	œ Int	ernal -									Р	AGE 1
			C Export			storn Export															
/															Pt Line						
Info	Claim ID	Patient	Date of Service	Office	Provider	Supervising Provider	Billing Provider	Billed	Allowed	Adimt	lns 1 Paid	Ins 2 Paid		Ins Bal	ltem Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status		Ins 2 Status
		. anom		U IIIUU			Totals:	\$1,670.00	\$1,670.00	\$0.00	\$0.00		\$0.00		\$0.00	\$1,670.00	\$0.00			-	
	207890475		4/07/2022 12:00PM	D Inpatient Hospital	Kermit Frog			\$1,495.00	\$1,495.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,495.00	\$0.00	\$1,495.00	\$0.00	Aetna - Institutional claims UB	 Balance Due 		
	207891919		4/07/2022 11:00AM	D Inpatient Hospital	Kermit Frog			\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.00	\$0.00	\$175.00	\$0.00	Aetna	A Not Submitted		

14. Export to file: Export a pre-populated field report from the Live Claims Feed. The report will be generated and available to you in the message center.

Live Claims Feed	
Select All Offices Select None C new office All D Inpatient Hospital All Primary Office All	
Claim Type All - Claim St 💿 🕤 🕤 All - Billing St: All - Appt Profiles: All - Calculate Counts 🚯 What's this? TFL Warning 🗆	
Patient Payer Name Payer ID drc claim # - 08/05/2022 Clinical Note	
Open window in new tab	Check All Clear Update Filter
Batch Status Change 🔹 🖶 Export to File 🔹 🖺 Custom Export Display 🔹 🕂 Schedule 🗘 Internal 🔹	PAGE 1

15. Bulk Print HCFA and Superbill: Click on the small arrow drop-down next to the "Export to file" button and select from the drop-down. You can filter the claims by patient or date range or insurance.

NOTE: You can print up to 50 HCFAs/Superbills at a time.

Live Claims Feed															
Select All Offices Sele	C new offic	ce All - D Inpat	ient Hospita		Primary Offic	e All -									
Claim Type All -	Claim St 🕒 🖨 🔁 🌶	All - Billing St	: All 👻 🛛 A	opt Profiles	: All 👻 🔽	Calculate Co	unts 🚯 W	/hat's ti	nis? -	FL Warnin	g 🗆				
Patient +	Payer Name	Payer ID	drc claim #	From	n	— То	Cli	nical N	ote		~				
Open window in new tab											Che	ck All Cl	ear U	odate F	liter
Batch Status Change -	Export to File	🖺 Custom Export	Display	- + Scł	hedule 📢	🕽 Internal 🕇								PAGE	E1
Info Claim ID Patier	Print HCFA Print HCFA (text)	Supervisin Provider Provider	g Billing Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid		Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status
Danel	Print Superbill				\$149,891.52				\$18.16		\$16,750.74				

16. Custom Export: This feature will allow you to select fields to generate a report. Once you have selected the fields you would like to see, click on Export. The report will generate and available to you in the message center.

Live Claims Feed	
Select All Offices Select None C new office All - D Inpatient Hospital All - Primary Office All -	
Claim Type All - Claim St 💿 💿 💿 All - Billing St: All - Appt Profiles: All - Calculate Counts 🖲 What's this? TFL Warning	
Patient Payer Name	~
Open window in new tab	Check All Clear Update Filter
Batch Status Change - 🖨 Export to File - 🖻 Custom Export Display - + Schedule 💠 Internal -	PAGE 1 🔶

×

Export

Custom Export

Patient	Check All Uncheck Al
Full Name	Primary Ins Group #
First Name	Secondary Ins Payer
Last Name	Secondary Ins Payer ID
Chart ID	Secondary Member ID
Date of Birth	Secondary Ins Plan Name
Primary Provider	Secondary Ins Group #
Home Phone	Auto Insurance Payer
Cell Phone	Auto Insurance Payer ID
Office Phone	Auto Insurance Case #
Email	Worker's Comp Payer
Gender	U Worker's Comp Payer ID
Race	Uvrker's Comp Case #
Ethnicity	Emerg Contact Name

17. Display: Select only the required fields/columns that you want to display in the live claims feed screen.

Select All Offices Sel	ect None	C new offi	ice All -	D Inpatien	t Hospital All - Primary Office	e All -									
Claim Type All -	Claim St		All -	Billing St: A	II ▼ Appt Profiles: All ▼ C	alculate Co	ounts 🚯 W	/hat's t	his? 1	FFL Warnir	ng 🗌				
Patient 📕	Payer Name		Payer	ID d	rc claim # From -	- To	Cli	nical N	ote		~				
Open window in new ta															
Open window in new ta											Che	ck All	Clear U	pdate F	ilter
atch Status Change -	Export to F	-ile 🔻	🖺 Custo	om Export	Display - + Schedule 🔅	Internal -								PAGE	1 >
									-				_		
Info Claim ID Patier	Date of nt Service	Office	Provider	Supervising Provider	Show All	Adjmt	Ins 1 Paid	Ins 2 Paid		Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status
					🗹 Info										
					🗹 Claim ID										
					Provider										
					Supervising Provider										
					Billing Provider										
					Billing ProviderBilled										
					✓ Billed										
					 Billed Allowed 										
					 Billed Allowed Adjustment 										
					 Billed Allowed Adjustment Primary Insurer Paid 										
					 Billed Allowed Adjustment Primary Insurer Paid Secondary Insurer Paid 										
					 Ø Billed Allowed Adjustment Primary Insurer Paid Secondary Insurer Paid Patient Paid 										
					 Ø Billed Allowed Adjustment Primary Insurer Paid Secondary Insurer Paid Patient Paid Insurer Balance Patient Balance Claim Balance 										
					 Ø Billed Allowed Adjustment Primary Insurer Paid Secondary Insurer Paid Patient Paid Insurer Balance Patient Balance Claim Balance Expected Reimbursement 										
					 S Billed Allowed Adjustment Primary Insurer Paid Secondary Insurer Paid Patient Paid Patient Paid Insurer Balance Claim Balance Expected Reimbursement Primary Insurer 										
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					 Billed Allowed Adjustment Primary Insurer Pald Secondary Insurer Pald Secondary Insurer Pald Patient Pald Insurer Balance Claim Balance Expected Reimbursement Primary Insurer Primary Insurer Secondary Insurer Secondary Insurer 										
					 Billed Allowed Adjustment Primary Insurer Paid Secondary Insurer Paid Patient Paid Insurer Balance Patient Balance Claim Balance Expected Reimbursement Primary Insurer Primary Insurer Secondary Insurer Secondary Insurer Secondary Insurence Status 										
					 Billed Allowed Adjustment Primary Insurer Paid Secondary Insurer Paid Patient Paid Insurer Balance Patient Balance Claim Balance Expected Reimbursement Primary Insurer Secondary Insurer Secondary Insurer Secondary Insurer Secondary Insurence Status First EDI Date 										
					 Billed Allowed Adjustment Primary Insurer Paid Secondary Insurer Paid Patient Paid Insurer Balance Patient Balance Claim Balance Expected Reimbursement Primary Insurer Primary Insurer Secondary Insurer Secondary Insurer Secondary Insurence Status 										

18. Schedule: Schedule an appointment directly from this screen for your existing patients.

Live Claims Feed								
Select All Offices Select N	C new office All -	D Inpatient Hospit	al All 👻 Primary	Office All -				
Claim Type All - Claim	n St 🕒 🖨 🖨 🖨 All 🗸	Billing St: All -	Appt Profiles: All -	Calculate Counts	• What's this?	TFL Warning		
Patient Pa	yer Name 🔹 Payer	ID drc claim	# From	— То	Clinical Note	~		
Open window in new tab							Check All Clear	Update Filter
Batch Status Change 🗸 🖨	Export to File 👻 🖺 Cust	om Export Displa	y - + Schedule	🌣 Internal 🗝				PAGE 1 🔶
Schedule Service Patient Office		•		×				
Examroom Scheduled Time		~						
			Create					

19. You can also sort claims by "Date of service, Billed, Insurance, etc." by clicking on the blue highlighted column headers. The system will reorder claims based on which field you selected.

				Date of			Supervising	Billing					Ins 2	Pt		Pt Line	Claim	Ехр		Ins 1
C	Info	Claim ID	Patient	Service	Office	Provider	Provider	Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Paid	Paid	Ins Bal	Item Bal	Bal	Reimbr	Ins 1	Status

20. Patient name: Click on the patient name to go to the demographics screen.

Select All Offices	Selec	ct None	C new of	fice All -	D Inpatie	nt Hospita	al All -	Primary Offic	ce All -									
Claim Type All -	C	Claim St 🏾 🕒		All -	Billing St:		Appt Profiles:	: All 🗕 🔽	Calculate Co	ints 🚯 W	'hat's th	is? T	FL Warning	g 🗌				
		Deves Marra		₽ Payer		drc claim	# From	n	— То	Clir	nical No	te		~				
	new tab	Payer Name		- uyor										Che	ck All Cl	lear U	Ipdate Fi	ilter
atient Open window in r atch Status Chang	new tab				om Export	Display	/ - + Scł	hedule	🗘 Internal -					Che	ck All Cl	lear U		_
Open window in r	new tab	Export to		E Cust	om Export Supervising	Display		hedule		Ins 1 Paid	Ins 2 Paid		Ins Bal	Che Pt Line Item Bal	Claim Bal	lear U	PAGE	ilter E 1 → Ins 1 Status

21. Date of service: To edit or work on your claims, click on the "Date of service" which will take you directly to the billing details screen.

Live Claims Feed																		
Select All Offices	Select	None	C new off	ice All -	D Inpatier	nt Hospita	All -	Primary Offic	e All 🗸									
Claim Type All	Cla	aim St 🕒 🕻		All -	Billing St: A	A T	ppt Profiles:	All -	alculate Co	ounts 🚯 W	/hat's th	nis? 1	FL Warnin	g 🗌				
Patient	+	Payer Name		+ Payer	ID	Irc claim #	From	1	— То	Cli	nical No	ote		~				
Open window in	new tab (Che	ck All Cl	ear U	pdate F	ilter
Batch Status Chan	ge •	Export to I	-ile 🔻	🖺 Cust	om Export	Display	- + Sch	nedule 🕻	🕽 Internal 👻								PAGE	1 >
Info Claim ID	Patient	Date of Service	Office	Provider	Supervising Provider	-	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status
		1				Totals:	\$238,591.76	\$149,891.52	\$88,700.24	\$112,463.10	\$0.00	\$18.16	\$20,659.52	\$16,750.74	\$37,410.26	\$0.00		
S 220490410	Donald (Demo) Reed	8/05/2022 04:45PM	Primary Office				\$88.60	\$88.60	\$0.00	\$0.00	\$0.00	\$0.00	\$88.60	\$0.00	\$88.60	\$0.00	FL BCBS	C Bill Insurance

22. Billing Details Screen: On the top left-hand side, select the status from the "Billing Status" drop-down.

• Example: To bill out your claims, select "Bill Insurance, Bill Secondary Insurance, Auto Accident Claim, Worker's Comp Claim, Durable Medical Equipment Claim" depending on the payer who needs to receive the claim.

hedule Clinical Pa	atients Reports	Billing Ac	count	Marketplace	Help 💈	×				
		View Service	+ EOB	E SuperBill	& Clinical Note		HCFA/1500	HCFA/1500 (text)	🔒 Print Screen	
Institutional Claim	No	/						Claim Type		
0.5								Emergency Service Delay Reasor		
Billing Status	Bill Insurance	~					40	ute Manifestation Date		
ICD Version	ICD-10	<u> </u>					AC	Onset Date		- 1.4
Primary Insurer	- Default -	~								
Secondary Insurer	- Default -	`						Other Date		x 15 & 1
Billing Provider:	- If different to provide							Employmen	Is patient's condition related to	
Supervising Provider:	- If different to provide	er - 🗸 🗸								
Pt Payment	\$ 0 +							Auto Acciden Other Acciden		
Payment Profile	Insurance	~						EDI Billing Note		
Pt Payment Due								EDI Billing Note		
Billing Profile	Select Profile	✓ +						FIOVICEI		
Billing Pick List	Choose from Pick Li	st								
Diagnosis Pick List	Choose from Pt Prot	olems								
Payer pre-auth #	+									
Do Not Transmit	Do not transmit auth	norization number	to payer							
Referral #										
Billing Facility		/								
Purchased Serv Provider										
Appointment Notes	This is a demo appoint	mont								
	This is a denio appoint									
Follow-up Date										
Billing Notes			+							
aid In Full										
alance Due										
ettled										
ternal Review										
ill Insurance										
ill Secondary Insura	nce									
/orker's Comp Claim										
uto Accident Claim										
ato Accident olann	pment Claim									
urable Medical Equi										
urable Medical Equi stitutional Service										
urable Medical Equi stitutional Service oding Clarification										
urable Medical Equi stitutional Service oding Clarification eady to Bill										
urable Medical Equi stitutional Service oding Clarification eady to Bill eady to Code										
urable Medical Equi stitutional Service oding Clarification eady to Bill eady to Code nrollment Pending										
urable Medical Equi stitutional Service oding Clarification eady to Bill eady to Code nrollment Pending axed/Mailed Appeal										
urable Medical Equi stitutional Service oding Clarification eady to Bill eady to Code nrollment Pending										

23. Pt Payment (copay): Update or post the patient payment directly from this screen. The payment will reflect automatically in the patient payments screen.

	View Service + EOB
Institutional Claim	No
Billing Status	Bill Insurance
ICD Version	ICD-10 ~
Primary Insurer	- Default -
Secondary Insurer	- Default -
Billing Provider:	- If different to provider -
Supervising Provider:	- If different to provider -
Pt Payment	\$ 0 +
Payment Profile	Insurance V
Pt Payment Due	
Billing Profile	Select Profile V
Billing Pick List	Choose from Pick List
Diagnosis Pick List	Choose from Pt Problems
Payer pre-auth #	+
Do Not Transmit	Do not transmit authorization number to payer
Referral #	
Billing Facility	
Purchased Serv Provider	
Appointment Notes	This is a demo appointment
Follow-up Date	
Billing Notes	

24. Payment Profile: Select the right profile name to reflect the claim balance correctly. Options include Cash, Insurance, Insurance Out of Network, Auto Accident, and Workers' Comp. Selecting the correct payment profile will ensure that the claim is submitted to the correct payer.

	Vie	ew Service	+ EOB
Institutional Claim	No		
Billing Status	Bill Insurance 🗸		
ICD Version	ICD-10 ~		
Primary Insurer	- Default -		
Secondary Insurer	- Default -		
Billing Provider:	- If different to provider -	~	
Supervising Provider:	- If different to provider -	~	
Pt Payment	\$ 0 +	_	
Payment Profile	Insurance v		
Pt Payment Due		-	
Billing Profile	Select Profile 🗸	+	
Billing Pick List	Choose from Pick List		
Diagnosis Pick List	Choose from Pt Problems	3	
Payer pre-auth #	+		
Do Not Transmit	Do not transmit authoriza	tion number t	o payer
Referral #			
Billing Facility		1	
Purchased Serv Provider			
Appointment Notes	This is a demo appointment		
Follow-up Date		70	
Billing Notes			+

Cash Insurance Insurance Out of Network Auto Accident Workers' Comp

25. Billing Pick List: Choose the codes from your pick list instead of typing in the codes manually.
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	View Service + EOB
Institutional Claim	No
Ø Billing Status	Bill Insurance 🗸
ICD Version	ICD-10 🗸
Primary Insurer	- Default -
Secondary Insurer	- Default -
Billing Provider:	- If different to provider -
Supervising Provider:	- If different to provider -
Pt Payment	\$ 0 +
Payment Profile	
Pt Payment Due	
Billing Profile	Select Profile
Billing Pick List	Choose from Pick List
Diagnosis Pick List	Choose from Pt Problems
Payer pre-auth #	+
Do Not Transmit	Do not transmit authorization number to payer
Referral #	
Billing Facility	
Purchased Serv Provider	
Appointment Notes	This is a demo appointment
Follow-up Date	
Billing Notes	

26. +EOB: Add/upload the insurance EOB directly from this screen by clicking on the "+EOB" button.

View Service + EOB SuperBill & Clinical Note Clinical Note HCFA/1500 (text) + Print Sc
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27. Superbill, HCFA/1500, and HCFA/1500 (text): Click on Superbill to print the patient a detailed receipt including CPT, HCPCS, and ICD-10 codes. HCFA/1500 will print an HCFA form on plain white paper, while the (text) version will allow printing on preprinted HCFA paper.

View Service + EOB SuperBill & Cinical Note Clone HCFA/1500 HCFA/1500 (text)
--

28. Print screen: Click on "Print Screen" to print the entire screen which can be used as proof of timely filing.

View Service + EOB 🖃 SuperBill & Clinical Note 🗅 Clone HCFA/1500 HCFA/1500 (text)	en
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29. Claim Type: On the top right-hand side, select the claim type as "Re-submission" or "Void claim" to submit a corrected claim or void claim. There is a box to enter the "ID of original claim" to assist the payer in

reprocessing/voiding the original claim.

HCFA/1500 (text)	Print Screen	
Claim Type	✓ Default	
Emergency Service	Re-submission	
Delay Reason	Void claim	
Acute Manifestation Date		
Onset Date	431: Onser 🗸	(HCFA box 14)
Other Date	- Other Da 🗸	(HCFA box 15 & 19)
	Is patient's condition related to	D
Employment	No 🗸	
Auto Accident	No 🗸	
Other Accident	No 🗸	
EDI Billing Note	(HCFA/CMS-1500 Line 19)	
Providers		

30. EDI Billing note: Check off this box to add a note on the claim. Any information entered here will appear in Box 19 on the HCFA 1500 form.

	Claim Type	Default		~	
E	mergency Service	No	~		
	Delay Reason	- Not Us	ed -	~	
Acute M	anifestation Date				
	Onset Date	431: Ons	e 🖌		(HCFA box 14)
	Other Date	- Other D)a 🗸		(HCFA box 15 & 19)
		Is patient's	s condition	related to	
	Employment	No	~		
	Auto Accident	No	~		
	Other Accident	No	~		
	EDI Billing Note	(HCFA	/CMS-1500) Line 19)	
	Providers				

31. ICD-10 codes can be added in this section. You can enter the code or a description in the box marked with the red arrow. If you need to change the order of the codes, click on the 3 blue horizontal lines (notated by the blue box). This will allow you to drag and drop the codes in whatever order you need them.

Line items transactions

Pati	ent does not have una	llocated payment Appt. does not have unallocated payment Primary Insurer: (00690) FL BCBS
#	ICD-10	Description	
	Add ICD-10 cook		
1	M15.0	Primary generalized (osteo)arthritis	×
2	M16.9	Osteoarthritis of hip, unspecified	×

32. Add the CPT/HCPCS/CUSTOM by clicking on "+Add Line Item" at the bottom left.

Code/Check Date	Description	Mods/Posted Date	Service Date 🕜	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type		
					Totals:		\$88.60	\$88.60	\$0.00	\$0.00	\$0.00	\$0.00	\$88.60	\$0.00	C Bill Insurance		=
C 99213 🔶		Q6	From date To date	1.00	1200	88.60	\$88.60	\$88.60	\$0.00	\$0.00	\$0.00	\$0.00	\$88.60	\$0.00	Bill Insurance	\$	
+ Add Line Item	Delete Selected	d											C Repars	e ERA	i Claim Info 🗸	Verify (& Sav

33. To post an insurance payment, click on the three lines or blue plus "+" icon towards the right corresponding to the code, select the appropriate reason codes, and hit on "Verify and Save" to save your changes.

Code/Check Date Description	Mods/Posted Date	Service Date 📀	Qty/Min	Dx Pointers	Price	Billed	Allowed	Adjmt	Ins 1 paid	Ins 2 paid	Pt Paid	Ins Bal	Pt Bal	Status/Adj Type	
				Totals:		\$88.60	\$88.60	\$0.00	\$0.00	\$0.00	\$0.00	\$88.60	\$0.00	C Bill Insurance	=
C 99213 🐳	Q6	From date To date	1.00	1200	88.60	\$88.60	\$88.60	\$0.00	\$0.00	\$0.00	\$0.00	\$88.60	\$0.00	Bill Insurance	\$ 🔳 🕇
+ Add Line Item × Delete Select	cted										;	C Reparse	ERA	i Claim Info 🗸	Verify & Save

Loge

34. Logs: All the changes made on this screen will be tracked under the "Logs" section.

Logs

Datetime	User	Description
Aug 5, 2022 10:00:13 AM		primary_insurance_id_number changed from "" to "FAKEID7039"