Create & Submit Social Service Batch

The "Create & Submit Social Service Batch" How To provides instructions on:

- Create Batch 2
- Submit Batch 13
- Revalidate Batch 22

A Batch (template) is a group of claims which **share the same date of service.** The Batch allows the provider to create a group (batch) of templates, change the date of service on all the templates at one time, and submit the batch all at once.

The process has two steps:

1. Create the batch
2. Submit the batch

Create Batch

This section is on how to create a template batch.

1. From the Provider Portal
2. Click on Social Service Manage Template

1 Provider Portal

2 Click on →

Create Batch

3. The Create Claim Template page appears

4. The list includes all the templates you have created for your domain

   a. Type of Claim is Social Service. If is not showing, use the drop down menu to select Social Service

3 Create Claim Template

Close | Add

Create Social Service Claim Template

Type Of Claim: Social Service * ← 4a

Claim Template List:

Edit | View | Delete | SaveAs/Copy | Create Batch | Create Batch All

Filter By: And Go

4 →

Template Name	Template Type	Last Updated By	Last Updated
[redacted]	Social Service	[redacted]	04/01/2013
[redacted]	Social Service	[redacted]	03/31/2013
[redacted]	Social Service	[redacted]	03/31/2013
[redacted]	Social Service	[redacted]	03/29/2013
[redacted]	Social Service	[redacted]	03/28/2013
[redacted]	Social Service	[redacted]	03/28/2013
[redacted]	Social Service	[redacted]	03/25/2013

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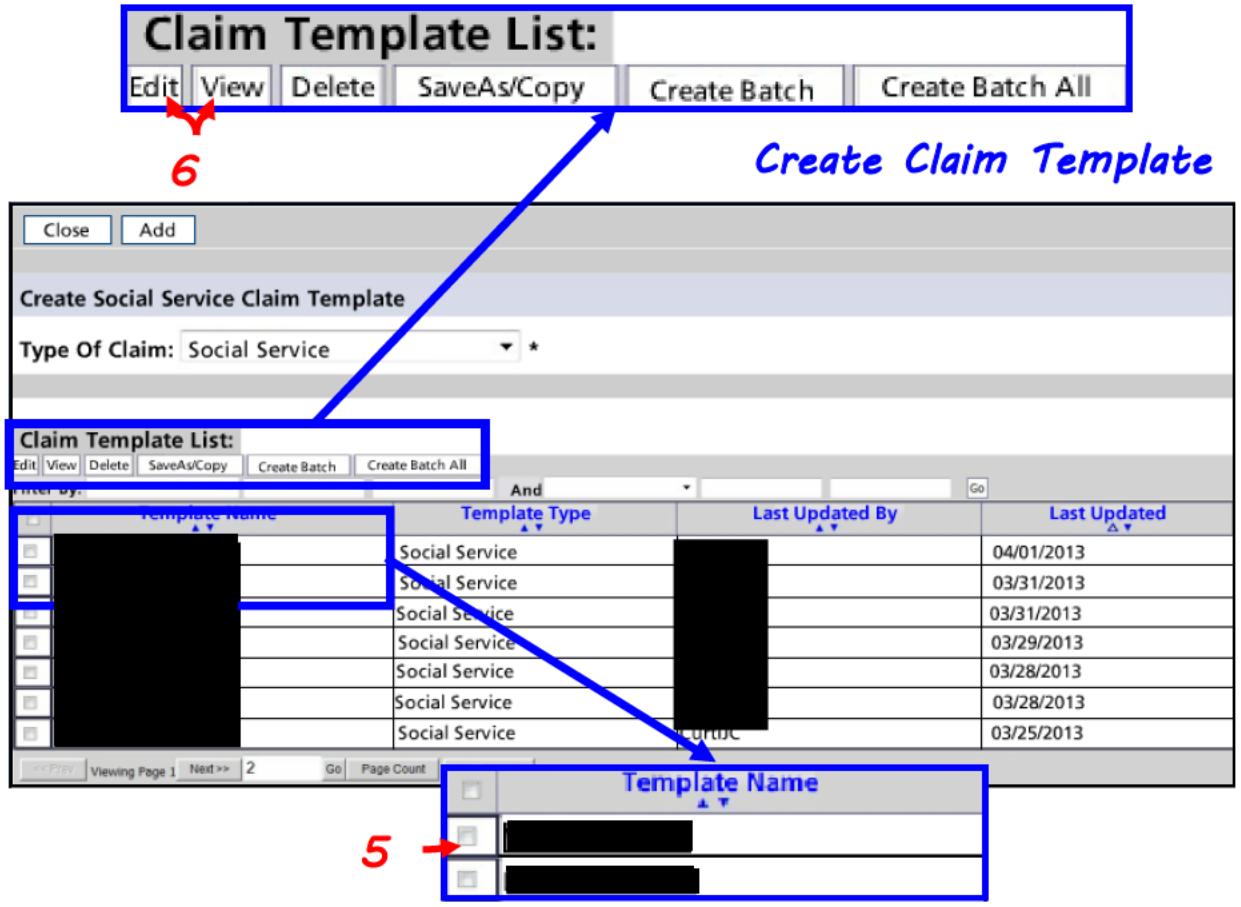
A Batch is a group of templates submitted at the same time which share the same date of service.

Create Batch

Note: To submit a template as part of a batch, the template must be a complete Basic Bill, including the service line.

- Number of units & submitted charges must be for the billing period
- The date of service can be blank or any date not in the future . When you create the Batch it will set the date of service on all the templates.



5. To view a template and verify that it is complete, click on ☐ box next to the desired template name

6. Click on Edit or View. Edit will allow you to change data on the saved template. View only allows you to view data on the saved template

Create Batch

7. The saved template appears

8. Verify that the template is complete, including service line

9. Change the template as needed

Number of units must be for this billing period.

7 Saved Template

ProviderOne | My Inbox

Welcome [redacted] You have logged in with EXT Provider Social Services Profile. Links: --Select--

Path: Provider Portal/ Social Service Claim Template List

Close | Save Template | Reset

Social Service Provider Billing Screen:

Note: asterisks (*) denote required fields. Billing Instructions

Basic Claim Information

Provider Billing | Subscriber | Claim | Service

PROVIDER INFORMATION

8 → * Template Name: [redacted]

BILLING PROVIDER

* Provider ID: [redacted]

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID: [redacted]

CLAIM INFORMATION

CLAIM INFORMATION

* Authorization Number: [redacted]

BASIC LINE INFORMATION

BASIC SERVICE LINE ITEMS

* Service Date From: mm dd ccyy

* Service Date To: mm dd ccyy

* Service Code:

Modifiers: 1: 2: 3: 4:

* Units:

Add Service Line Item | Update Service Line Item

Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information. Total Charges Submitting: $75.00

Line No	Service Dates From	Service Dates To	Service Code	Modifiers 1	2	3	4	Units	
	01/28/2014	01/28/2014	SA 420					10	Delete

9

Create Batch

10. Click on Save Template

11. Click on Close

Saved Template

10 Click on

11 Click on

My Inbox

Welcome [redacted] You have logged in with **EXT Provider Social Services** Profile.

Links: --Select--

Path: Provider Portal/ Social Service Claim Template List

Close | Save Template | Reset

Social Service Provider Billing Screen:

Note: asterisks (*) denote required fields. Billing Instructions

Basic Claim Information

Provider Billing | Subscriber | Claim | Service

PROVIDER INFORMATION Submitter ID: [redacted]

* Template Name: [redacted]

BILLING PROVIDER
* Provider ID: [redacted]

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT
* Client ID: [redacted]

CLAIM INFORMATION

CLAIM INFORMATION
* Authorization Number: [redacted]

BASIC LINE INFORMATION

BASIC SERVICE LINE ITEMS

* Service Date From: mm dd ccyy
* Service Date To: mm dd ccyy
* Service Code:
Modifiers: 1: 2: 3: 4:
* Units:

Add Service Line Item | Update Service Line Item

Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information. Total Charges Submitting: $75.00

Line No	Service Dates From	Service Dates To	Service Code	Modifiers 1	2	3	4	Units	
1	01/28/2014	01/28/2014	SA420					10	Delete

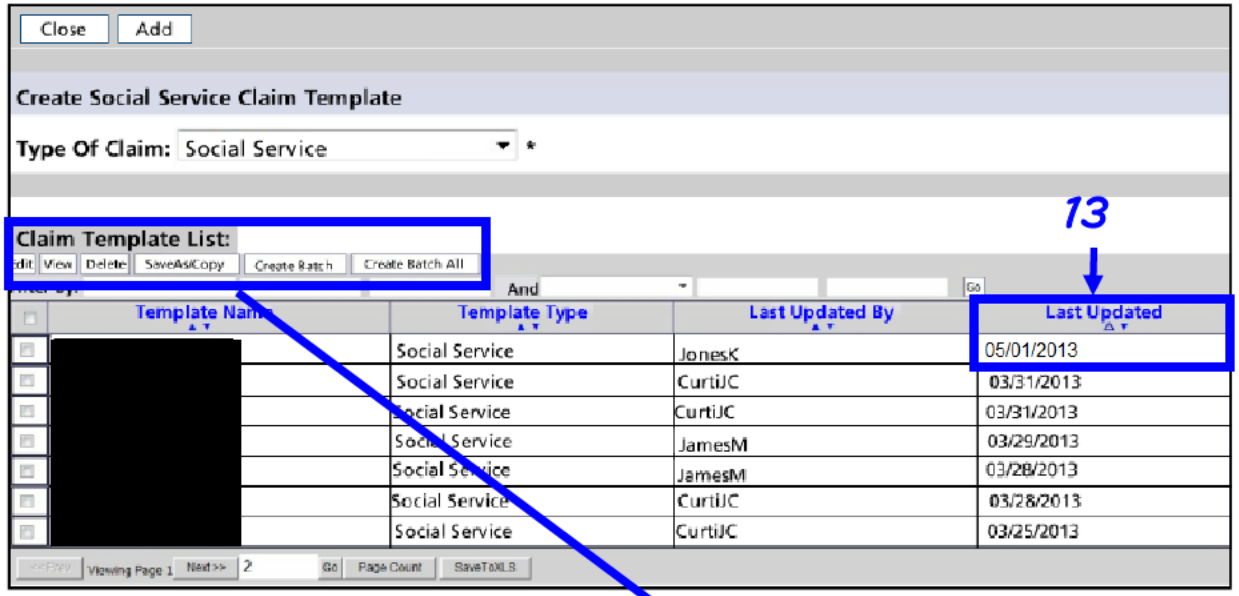
12. The Create Claim Template page appears.

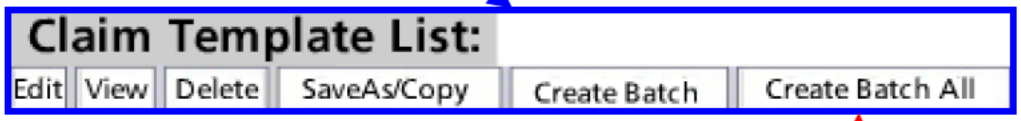
13. Last Updated shows that the template was updated.

Repeat the process of checking that a template is complete for each of the templates that will be included in the batch.

14. To include all the templates on the list in a batch, Click on Create Batch All

12 Create Claim Template





14 Click on

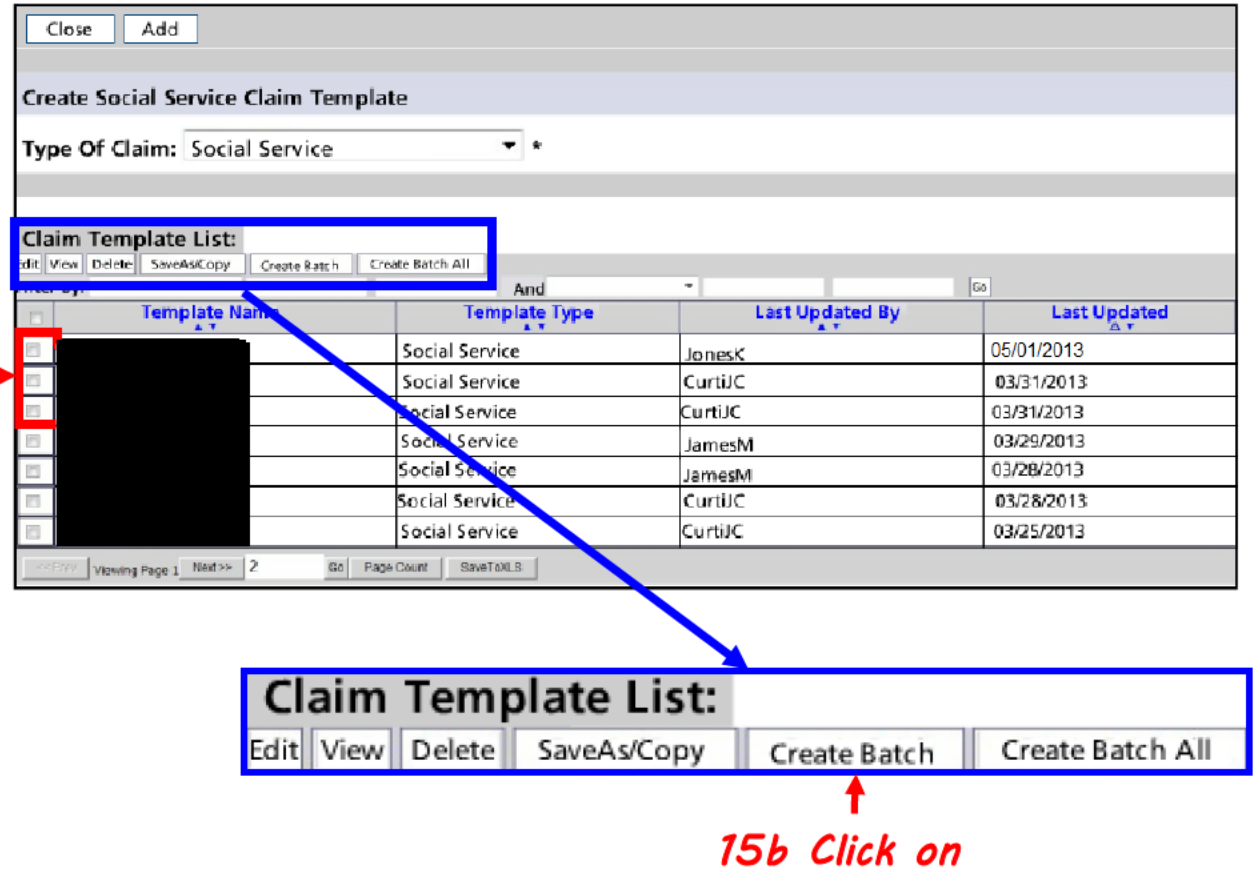
If you have a large number of templates, you can use the filter function to customize the template list so that you can use Batch All.

15. To submit selected templates in a batch:

a. Click on ☐ box next to the desired template names to include in the batch

b. Click on Create Batch

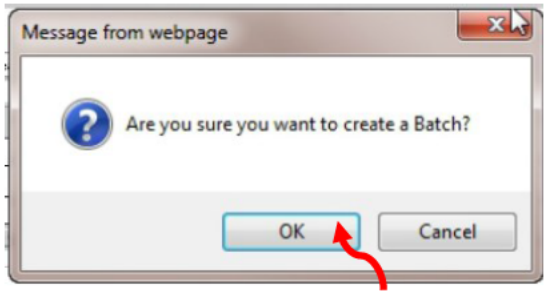
Create Claim Template



16. Pop-up appears

17. Click on OK

16 Pop-up



17 Click on

Create Batch

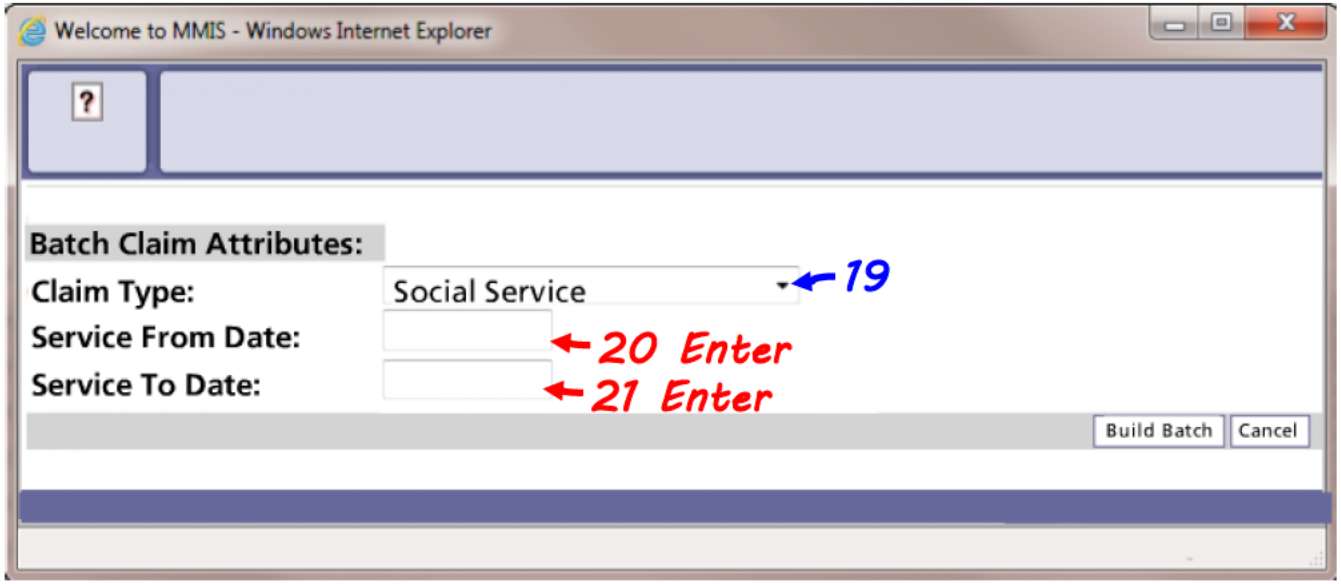
18. Batch Claim Attributes appears

19. Claim Type defaults to Social Service

20. Enter Service From Date

21. Enter Service To Date

18 Batch Claim Attributes

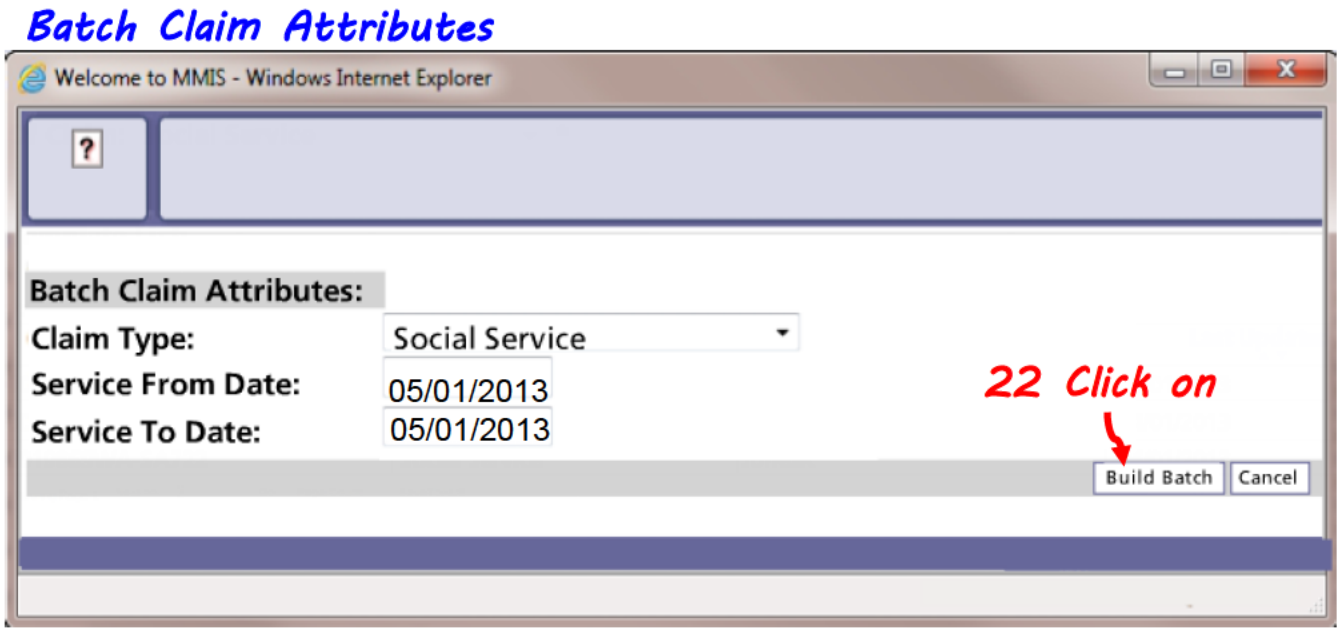


Service From Date & Service To Date

- The Date of Service will be changed on all the service lines on each template. All claims within the template must be for service provided on the date entered.
- The Date of Service can only be a single day.
- A date range can be used only if:
  - All unit types are **daily** or **monthly**
  - Days are consecutive (worked in a row)
  - All days are within the same calendar month or include entire months
  - # of units on templates equals the days or months within the range
  - All the templates have the same date range

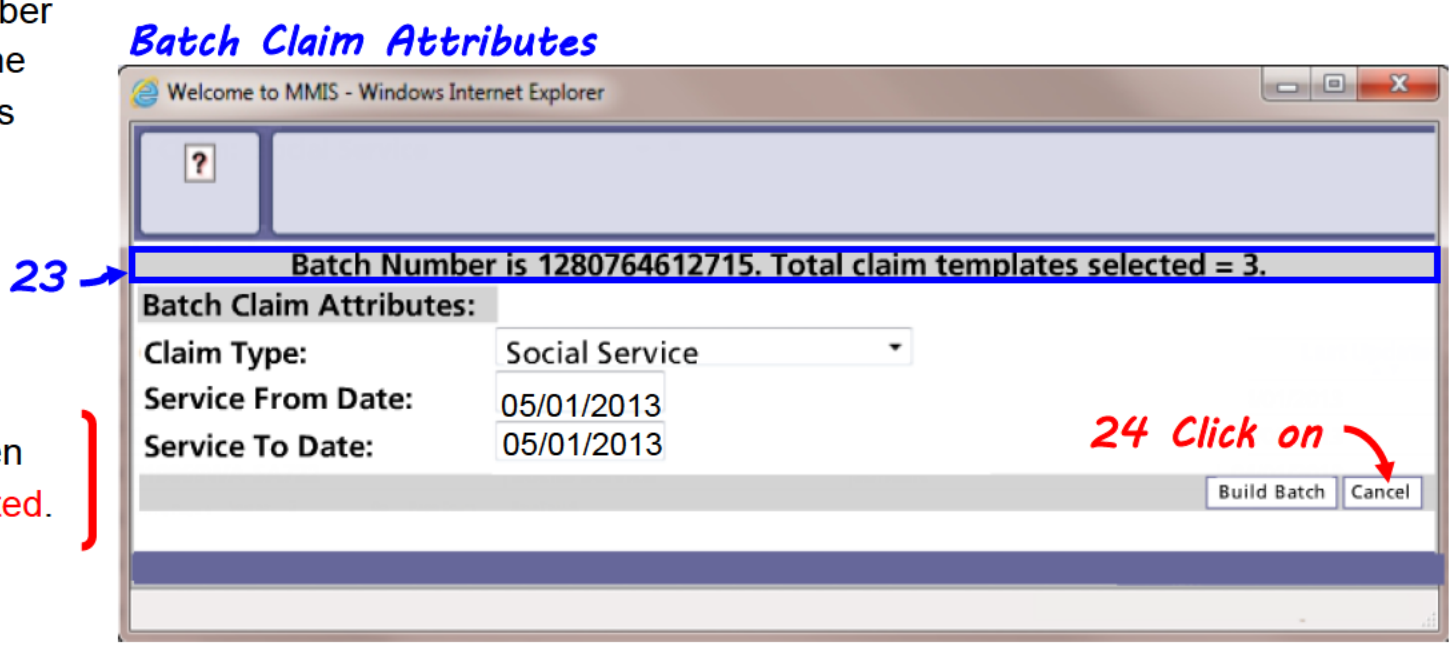
Create Batch

22. Click on Build Batch



23. Assigned Batch Number appears along with the number of total claims included in the batch

24. Click on Cancel



Your claim has now been built, but not yet submitted.

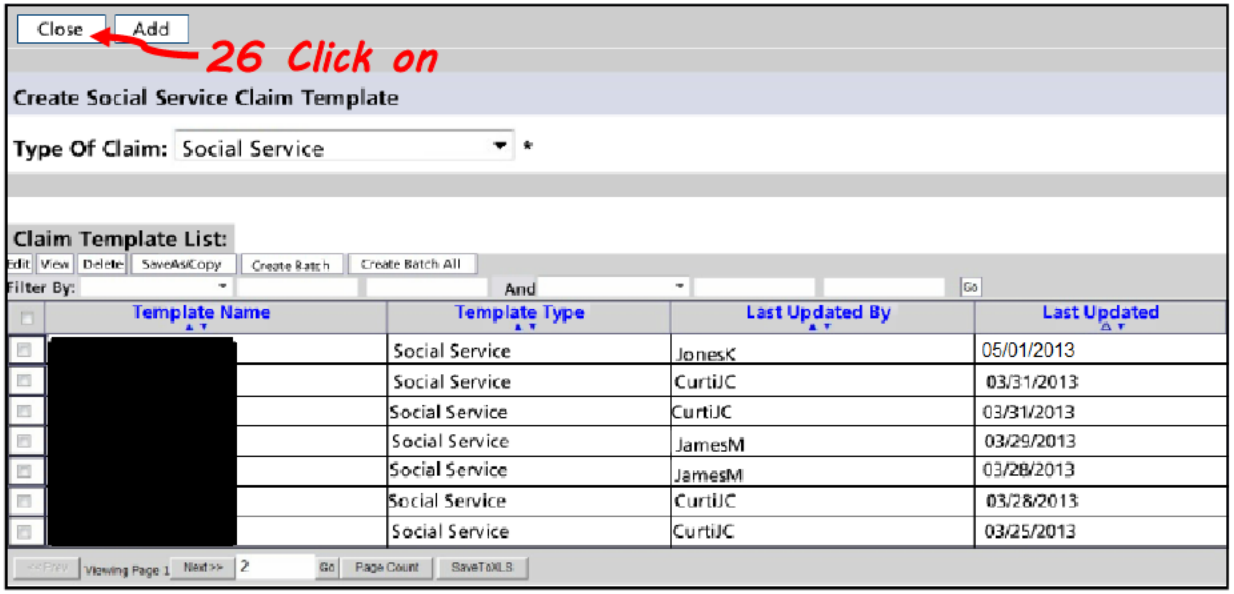
Create Batch

25. The Create Claim Template page appears

26. You can repeat the process and create additional batches

or

Click on Close to return to the Provider Portal



Submit Batch

This section is on how to submit a template batch.

1. From the Provider Portal
2. Click on Social Service Manage Batch Submission

1 Provider Portal

Submit Batch

3. From the Batch Claim Submission Status List

4. Click on ☐ box next to the desired batch. A batch must have Passed Validation before it can be submitted.

5. Click on View Claims

5 Click on

View Claims

3 Batch Claim Submission Status List

Close | View Claims | Revalidate | Delete

Social Service Batch Claim Submission Status List

Filter By : And Go

	Batch Number	Type	Created By	Batch Creation Date	Status	From DOS	To DOS	Total Billed Amount	Claim Count	Submitted Claim Count
☐	1280764612715	Social Service	JonesK	04/01/2013	Pass Validation	05/01/2013	05 /31/2013	$100.00	3	0
☐	1280764613200	Social Service	CurtiJC	04/01/2013	Submitted for Claims Loading	05/01/2013	05/15/2013	$150.00	4	4
☐	1280764613335	Social Service	CurtiJC	03/28/ 2013	Submitted for Claims Loading	04/01/2013	04/15/2013	$300.00	2	2
☐	1280764613335	Social Service	CurtiJC	03/15/2013	Submitted for Claims Loading	04/01/2013	04/30/2013	$215.00	2	2
☐	1280764614895	Social Service	JonesK	02/15/2013	Waiting	03/01/2013	03/30/2013	$105.00	3	0
☐	1280764614895	Social Service	CurtiJC	02/15/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	$285.00	2	2
☐	1280764614895	Social Service	CurtiJC	02/01/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	$100.00	3	3

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	Batch Number	Type	Created By	Batch Creation Date	Status	From DOS	To DOS	Total Billed Amount	Claim Count	Submitted Claim Count
☐	1280764612715	Social Service	JonesK	04/01/2013	Pass Validation	05/01/2013	05 /31/2013	$100.00	3	0

4 Click on

Pass Validation

No claims have Been submitted

After a batch is created, ProviderOne checks the batch to ensure the templates are complete bills:

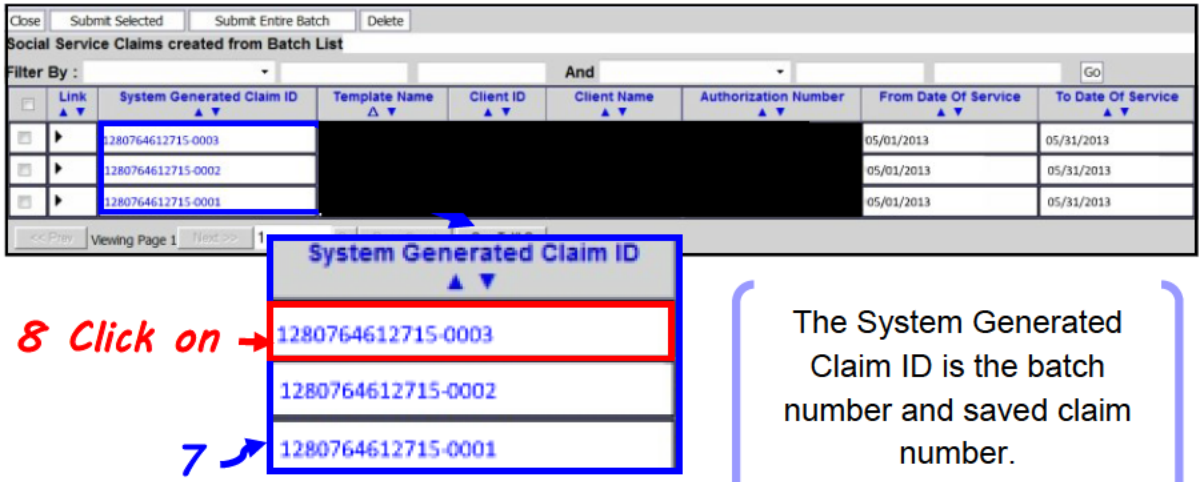
- **Pass Validation** means the all the templates have complete, valid information and the **batch can be submitted**.
- **Failed Validation** means one or more items within the batch is not valid and the batch cannot be submitted. See Revalidation section.

6. Claims Created from Batch List appears

7. Each template is assigned a System Generated Claim ID

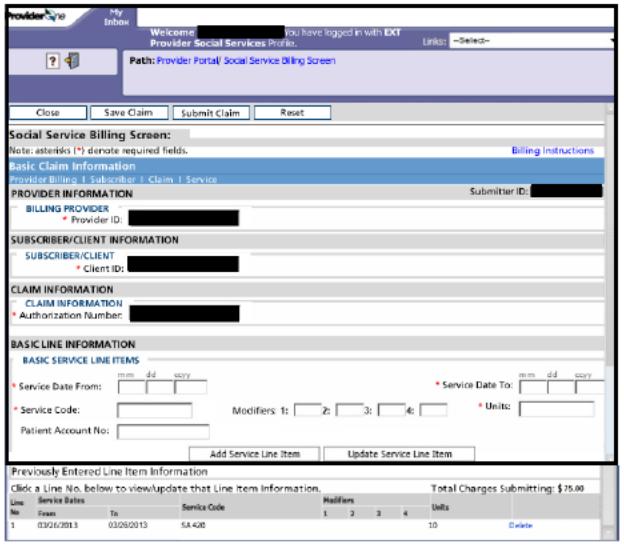
8. You can modify a claim prior to submission of the Batch.
   a. Click on the System Generated Claim ID number
   b. The template appears
   c. Modify the template as needed
   d. Save template

6 Claims created from Batch List



The System Generated Claim ID is the batch number and saved claim number.

9 Basic Billing Screen



10. To modify the claim

a. Click on Line Number

b. Basic Line Information populates

c. Enter modification

d. Click on Update Service Line Item

Basic Billing Screen

ProviderOne | My Inbox

Welcome [redacted] You have logged in with **EXT Provider Social Services** Profile. Links: --Select--

Path: Provider Portal/ Social Service Billing Screen

Close | Save Claim | Submit Claim | Reset

Social Service Billing Screen:

Note: asterisks (*) denote required fields. Billing Instructions

Basic Claim Information

Provider Billing | Subscriber | Claim | Service

PROVIDER INFORMATION Submitter ID: [redacted]

BILLING PROVIDER

* Provider ID: [redacted]

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID: [redacted]

CLAIM INFORMATION

CLAIM INFORMATION

* Authorization Number: [redacted]

10c Modify

* Units: 1

10b

BASIC LINE INFORMATION

BASIC SERVICE LINE ITEMS

* Service Date From: mm 05 dd 01 ccyy 2013

Service Date To: mm 05 dd 01 ccyy 2013

* Service Code:

Modifiers: 1: 2: 3: 4:

* Units: 10

Patient Account No:

Add Service Line Item | Update Service Line Item

Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information. Total Charges Submitting: $75.00

Line No	Service Dates From	Service Dates To	Service Code	Modifiers 1	2	3	4	Units	
1	03/26/2013	03/26/2013	SA 420					10	Delete

10a Click on

10d Click on → Update Service Line Item

Submit Batch

11. Modified service line appears

12. Click on Save Claim

Basic Billing Screen

ProviderOne | My Inbox

Welcome [redacted] You have logged in with **EXT Provider Social Services** Profile. Links: --Select--

Path: Provider Portal/ Social Service Billing Screen

12 Click on

Close | Save Claim | Submit Claim | Reset

Social Service Billing Screen:

Note: asterisks (*) denote required fields. Billing Instructions

Basic Claim Information

Provider Billing I Subscriber I Claim I Service

PROVIDER INFORMATION Submitter ID: [redacted]

BILLING PROVIDER

* Provider ID: [redacted]

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID: [redacted]

CLAIM INFORMATION

CLAIM INFORMATION

* Authorization Number: [redacted]

BASIC LINE INFORMATION

BASIC SERVICE LINE ITEMS

* Service Date From: mm dd ccyy
* Service Date To: mm dd ccyy
* Service Code:
Modifiers: 1: 2: 3: 4:
* Units:
Patient Account No:

Add Service Line Item | Update Service Line Item

Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information. Total Charges Submitting: $ 75.00

11

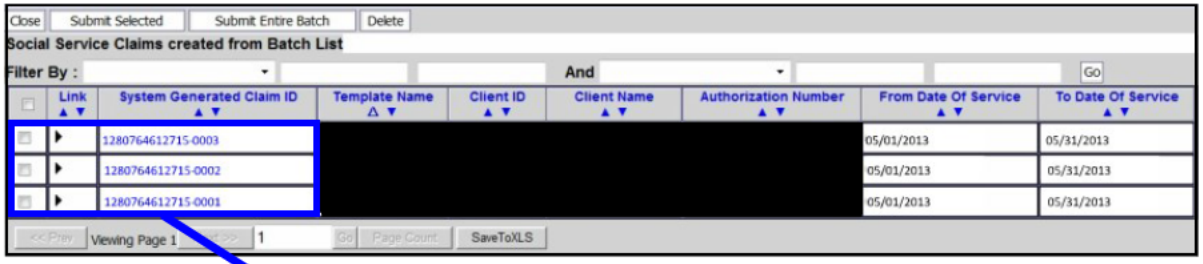
Line No	Service Dates From	Service Dates To	Service Code	Modifiers 1	2	3	4	Units	
1	05/01/2013	05/01/2013	SA 420					1	Delete

13. Claims Created from Batch List appears

14. You can delete a claim prior to submission of the batch. Click on ☐ box next to the desired batch

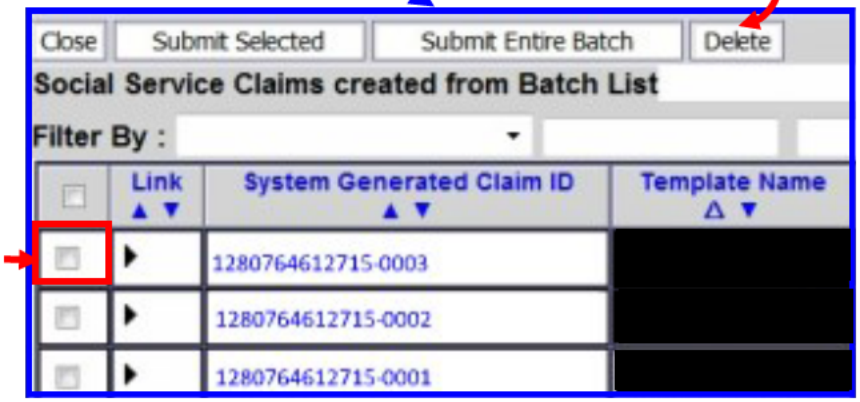
15. Click on Delete

13 Claims Created from Batch List



15 Click on

14 Click on



Submit Batch

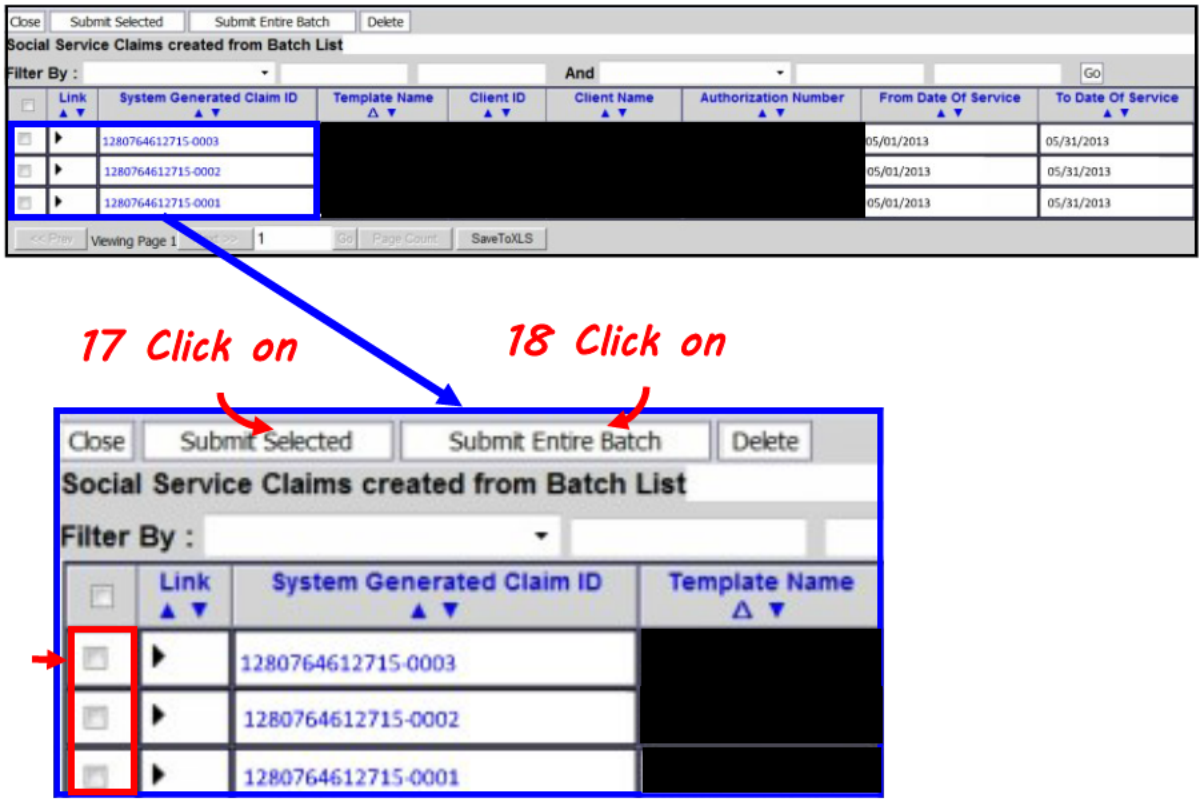
You can submit all or some of the listed claims.

16. You select some of the claims, click on ☐ box next to the desired claims

17. Click on Submit Selected

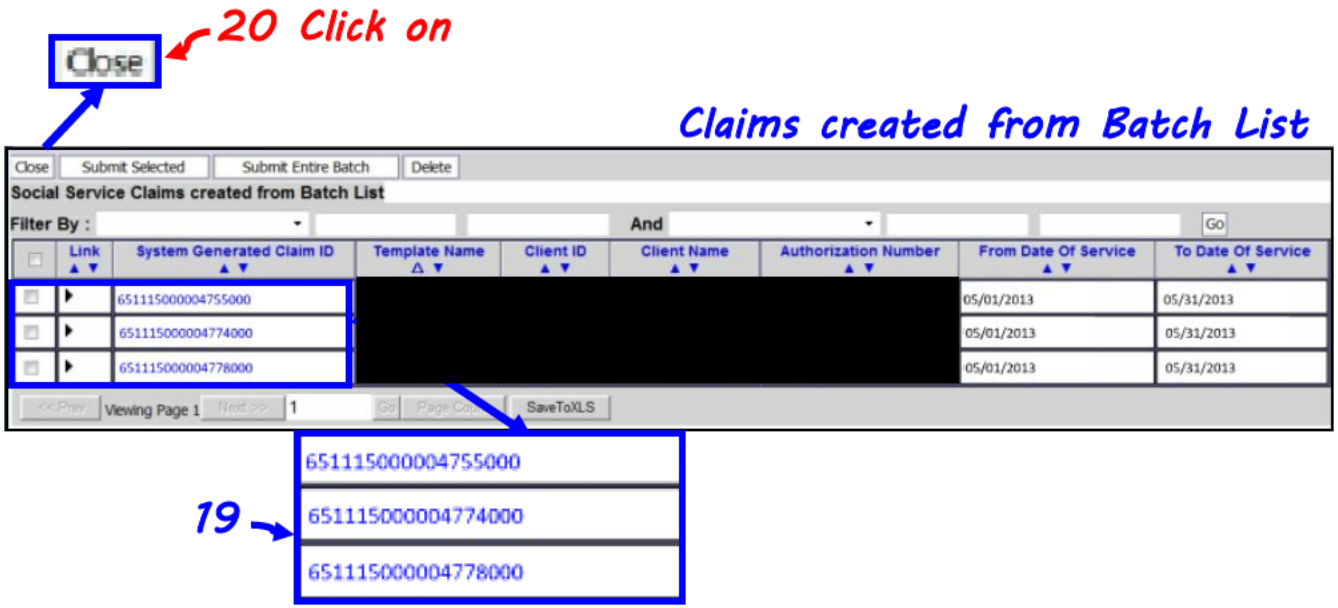
18. To submit all of the listed claims, click on Submit Entire Batch

Claims created from Batch List



19. After submitting the batch, the System Generated Claim ID is replaced with the Transaction Control Number (TCN)

20. Click on Close



Submit Batch

21. Batch Claim Submission Status List appears

22. Showing updated status

23. Showing Submitted Claim Count

24. Click on Close

21 Batch Claim Submission Status List

24 Click on

Close | View Claims | Revalidate | Delete

Social Service Batch Claim Submission Status List

Filter By : And Go

Batch Number	Type	Created By	Batch Creation Date	Status	From DOS	To DOS	Total Billed Amount	Claim Count	Submitted Claim Count
1280764612715	Social Service	JonesK	04/01/2013	Submitted for Claims Loading	05/01/2013	05 /31/2013	$100.00	3	3
1280764613200	Social Service	CurtiJC	04/01/2013	Submitted for Claims Loading	05/01/2013	05/15/2013	$150.00	4	4
1280764613335	Social Service	CurtiJC	03/28/ 2013	Submitted for Claims Loading	04/01/2013	04/15/2013	$300.00	2	2
1280764613335	Social Service	CurtiJC	03/15/2013	Submitted for Claims Loading	04/01/2013	04/30/2013	$215.00	2	2
1280764614895	Social Service	JonesK	02/15/2013	Waiting	03/01/2013	03/30/2013	$105.00	3	0
1280764614895	Social Service	CurtiJC	02/15/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	$285.00	2	
1280764614895	Social Service	CurtiJC	02/01/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	$100.00	3	

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22 Submitted for Claims Loading

Claim Count	Submitted Claim Count
3	3

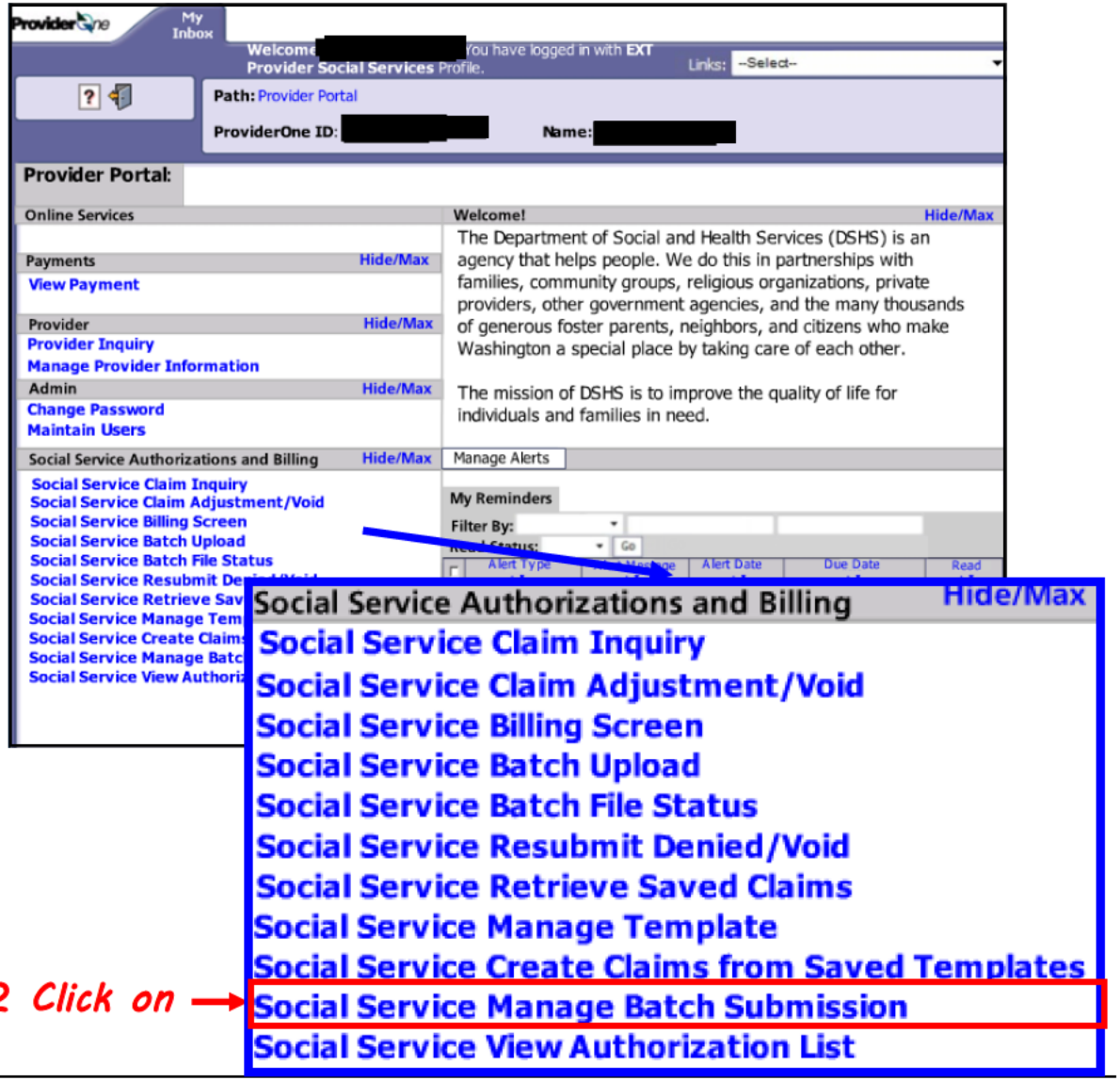
23

Revalidate Batch

After a batch is created, ProviderOne checks the batch to ensure the billing data is valid. This section is on how to check the validation of a batch and revalidate a template batch which has Failed Validation.

1. From the Provider Portal
2. Click on Social Service Manage Batch Submission

1 Provider Portal



Revalidate Batch

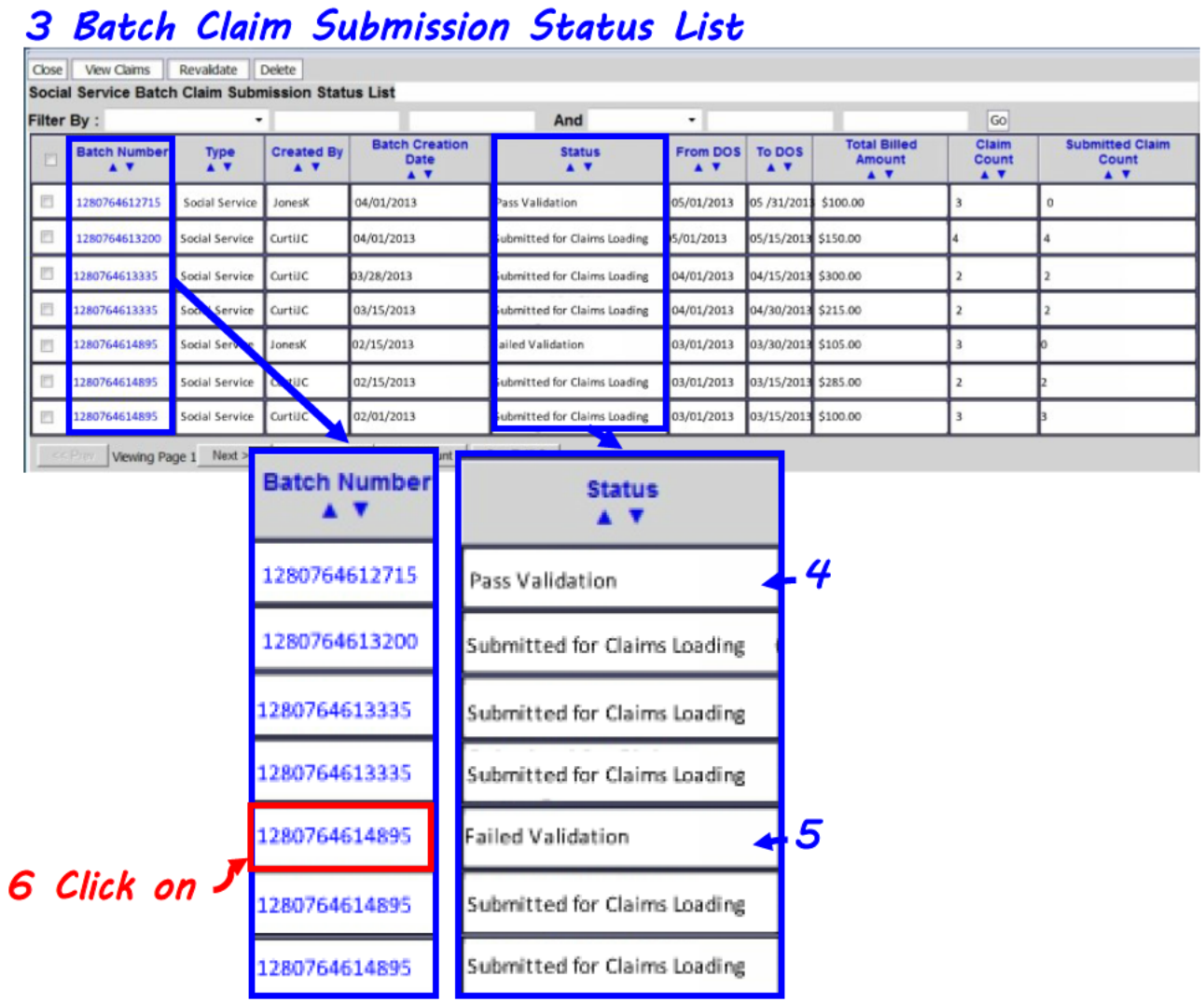
3. The Batch Claim Submission Status List appears

After a batch is created, ProviderOne checks the batch to ensure the billing data is valid.

4. Pass Validation means the all the template have valid information and the batch can be submitted

5. Failed Validation means one of more items within the batch is not valid and the batch can not be submitted

6. To view why a batch failed validation, click on the batch number



Revalidate Batch

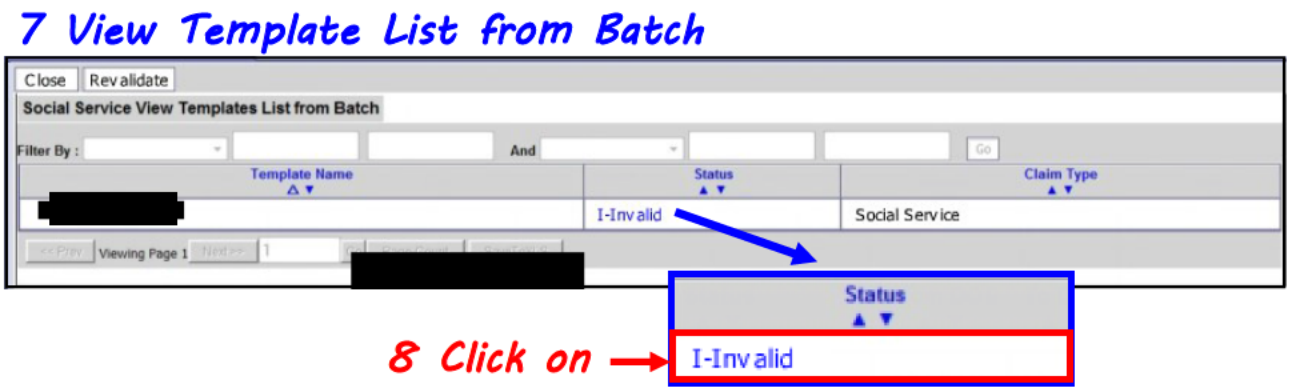
7. The View Template List from Batch appears

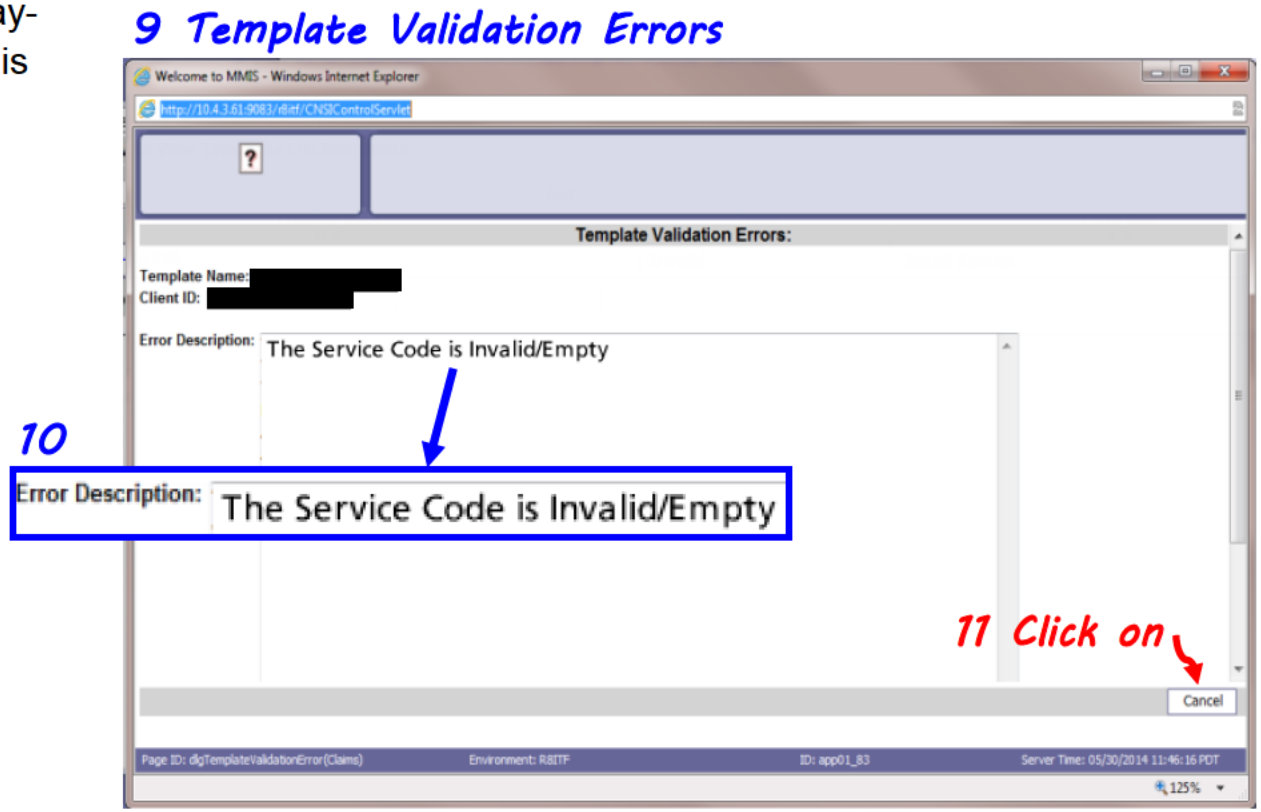
8. Click on status

9. Template Validation Errors appears

10. View Error Description saying that the service code is invalid or empty

11. Click on Close



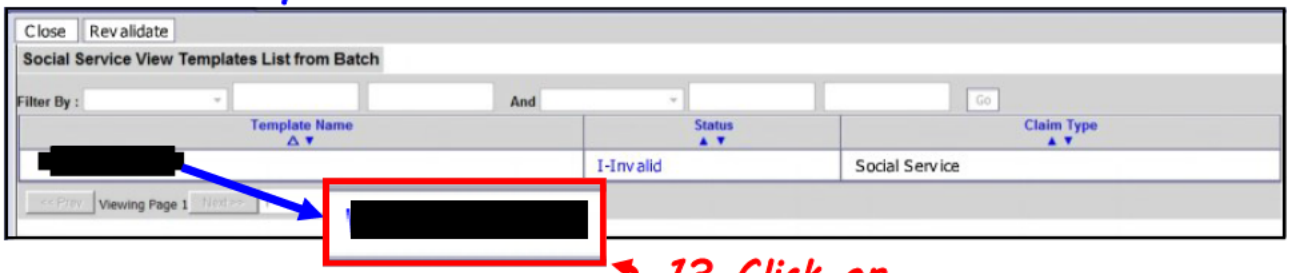


12. The View Template List from Batch appears

13. Click on template name

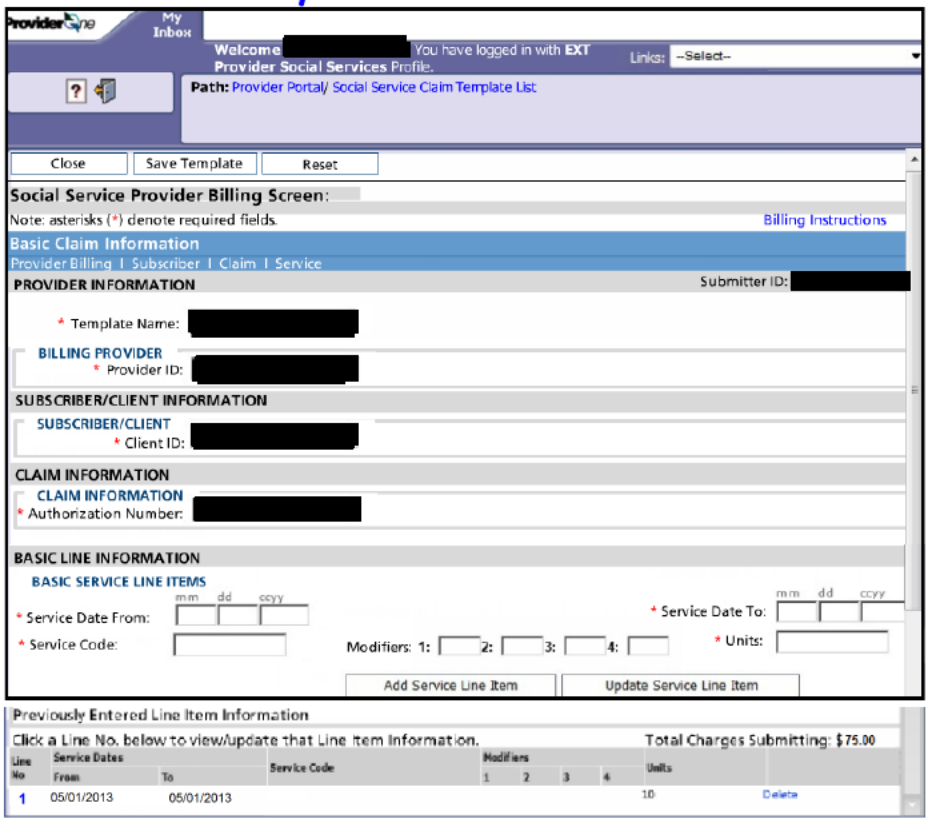
14. The Saved Template appears

12 View Template List from Batch



13 Click on

14 Saved Template



Revalidate Batch

15. To correct the problem

- **a.** Click on Line Number
- **b.** Basic Line Information populates
- **c.** Enter missing data/correct error
- **d.** Click on Update Service Line Item

Saved Template

ProviderOne | My Inbox

Welcome [redacted] You have logged in with **EXT Provider Social Services** Profile. Links: --Select--

Path: Provider Portal/ Social Service Claim Template List

Close | Save Template | Reset

Social Service Provider Billing Screen:

Note: asterisks (*) denote required fields. Billing Instructions

Basic Claim Information

Provider Billing I Subscriber I Claim I Service

PROVIDER INFORMATION Submitter ID: [redacted]

* Template Name: [redacted]

BILLING PROVIDER
* Provider ID: [redacted]

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT
* Client ID: [redacted]

CLAIM INFORMATION

CLAIM INFORMATION
* Authorization Number: [redacted]

15b

BASIC LINE INFORMATION

BASIC SERVICE LINE ITEMS

* Service Date From: mm 05 dd 01 ccyy 2013
* Service Date To: mm 05 dd 01 ccyy 2013
* Service Code:
Modifiers: 1: 2: 3: 4:
* Units: 10

15c Enter SA420

Add Service Line Item | Update Service Line Item

Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information. Total Charges Submitting: $75.00

Line No	Service Dates From	Service Dates To	Service Code	Modifiers 1	2	3	4	Units	
1	05/01/2013	05/01/2013						10	Delete

15a Click on 1

15d Click on Update Service Line Item

Revalidate Batch

16. Corrected service line appears

17. Click on Save Template

20 Click on

18. Pop-up appears

19. Click on OK

20. Click on Close

Saved Template

ProviderOne | My Inbox

Welcome [redacted] You have logged in with EXT Provider Social Services Profile. Links: --Select--

Path: Provider Portal/ Social Service Claim Template List

17 Click on

Close | Save Template | Reset

Social Service Provider Billing Screen:

Note: asterisks (*) denote required fields. Billing Instructions

Basic Claim Information

Provider Billing I Subscriber I Claim I Service

PROVIDER INFORMATION — Submitter ID: [redacted]

* Template Name: [redacted]

BILLING PROVIDER

* Provider ID: [redacted]

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID: [redacted]

CLAIM INFORMATION

CLAIM INFORMATION

* Authorization Number: [redacted]

BASIC LINE INFORMATION

BASIC SERVICE LINE ITEMS

* Service Date From: mm dd ccyy

* Service Date To: mm dd ccyy

* Service Code:

Modifiers: 1: 2: 3: 4:

* Units:

Add Service Line Item | Update Service Line Item

Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information. Total Charges Submitting: $75.00

Line No	Service Dates From	Service Dates To	Service Code	Modifiers 1	2	3	4	Units	
1	05/01/2013	05/01/2013	SA 420					1.0	Delete

16

18

Message from webpage

Do you want to save the Template?

19 Click on

OK | Cancel

Revalidate Batch

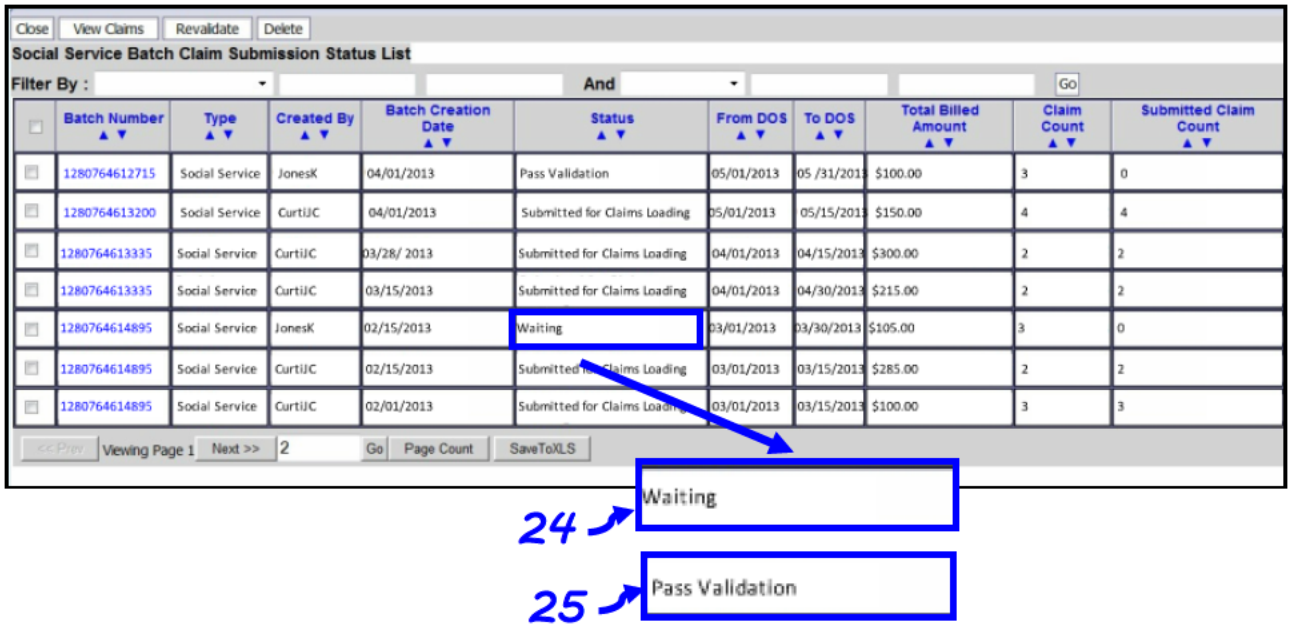
21. The View Template List from Batch appears

22. Click on Revalidate

21 View Template List from Batch

23. The Batch Claim Submission Status List appears

24. The updated Status is Waiting. It is most likely that the Status will have completed validation and the results will show

25. If the status is Pass Validation, the batch can now be submitted

23 Batch Claim Submission Status List