The "Create Template & Submit Claim" How To provides instructions on:

Templates can be used when you have repetitive billing; where the claim is the same, or nearly the same, each time you bill. With a template, you create a billing page that is reusable. Using templates is a two-step process: The first step is to create and save the template. The second step is to use the saved template to submit a claim.

Create Template

This section is on how to create a saved template.

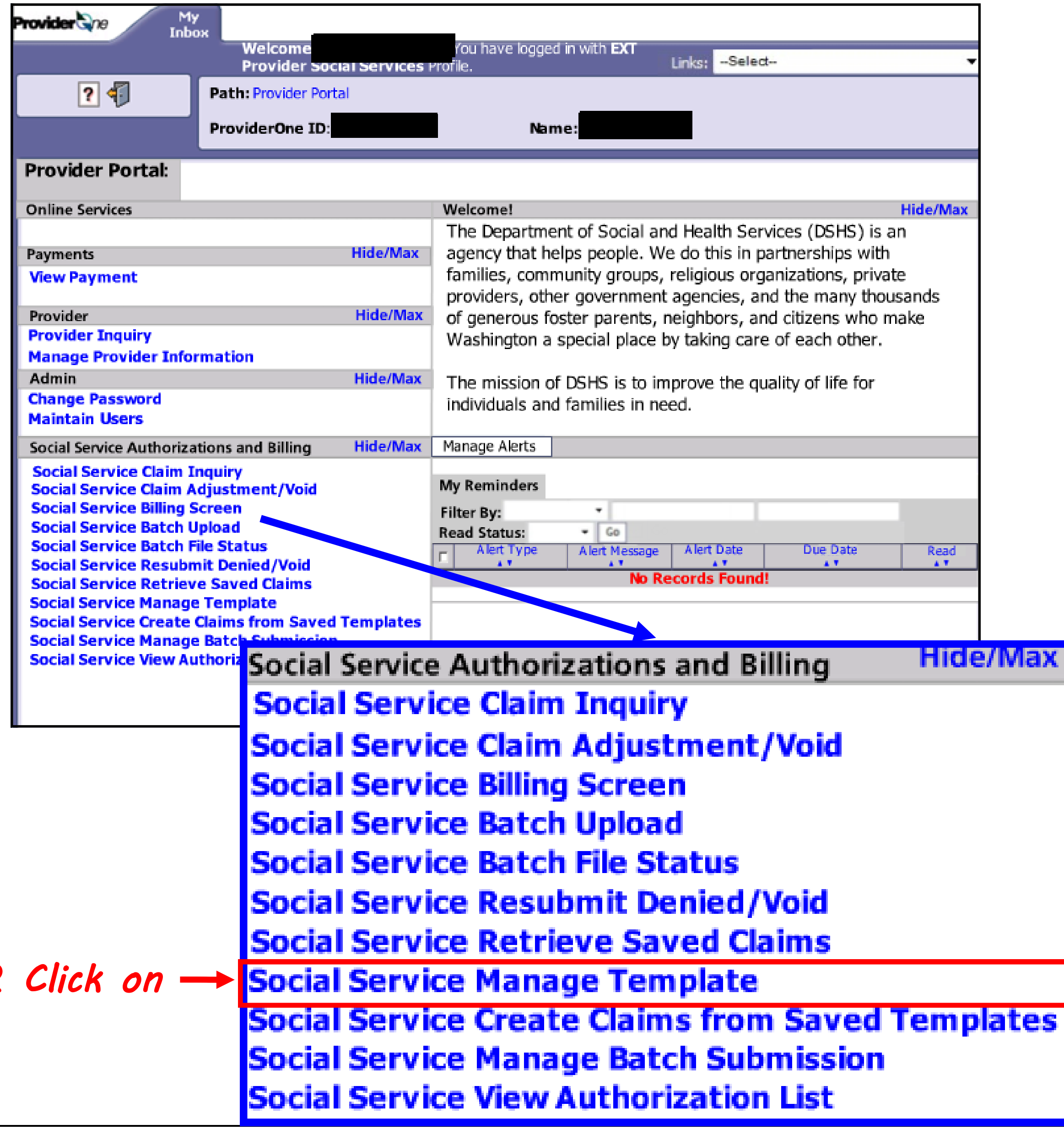
1. From the Provider Portal

2. Click on Social Service Manage Template

NOTE: You must turn off your pop-up blocker before you begin billing.

See page 20 for the quick instructions on how to turn off your computer's pop-up blocker.

1 Provider Portal



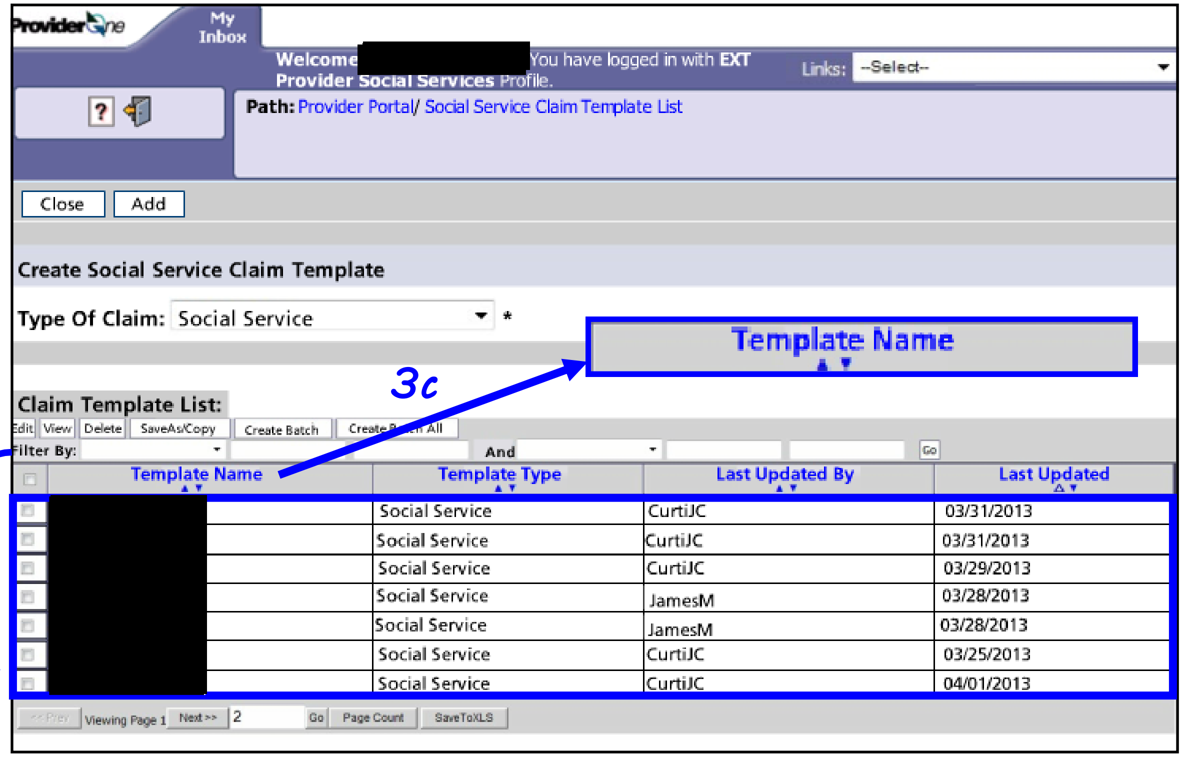
3. The Create Claim Template page appears. The page lists:

   a. All the saved templates within your domain

   b. If you have a lot of templates you can use the filters to find a template

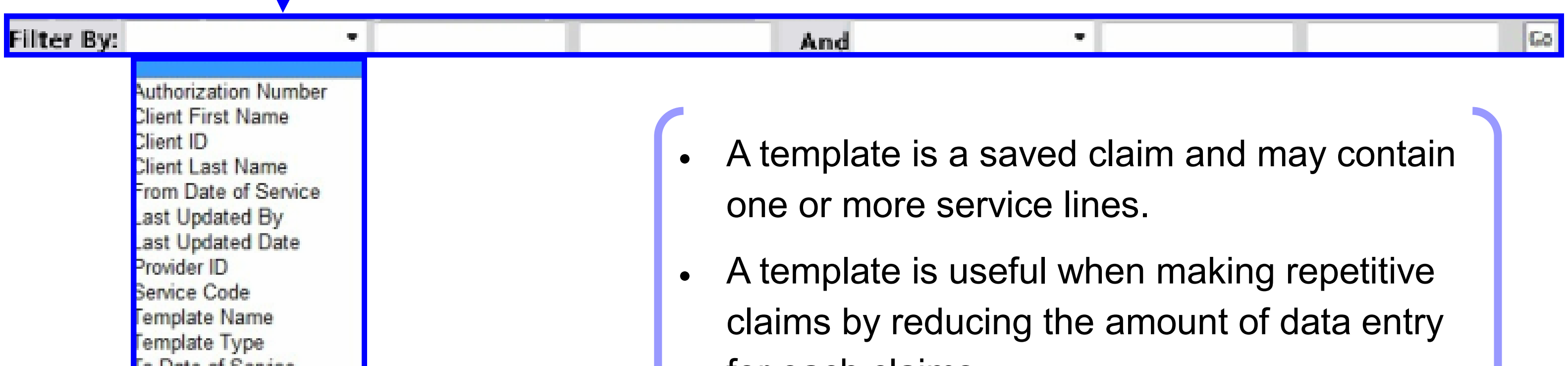
   c. You can sort a column using the ▲▼ to read A-Z/1-9 or Z-A/9-1

3 Create Claim Template



3a

3b



- A template is a saved claim and may contain one or more service lines.
- A template is useful when making repetitive claims by reducing the amount of data entry for each claims.

4. The page is used to:

   a. Add a new template

   b. Edit a saved template

   c. View a saved template

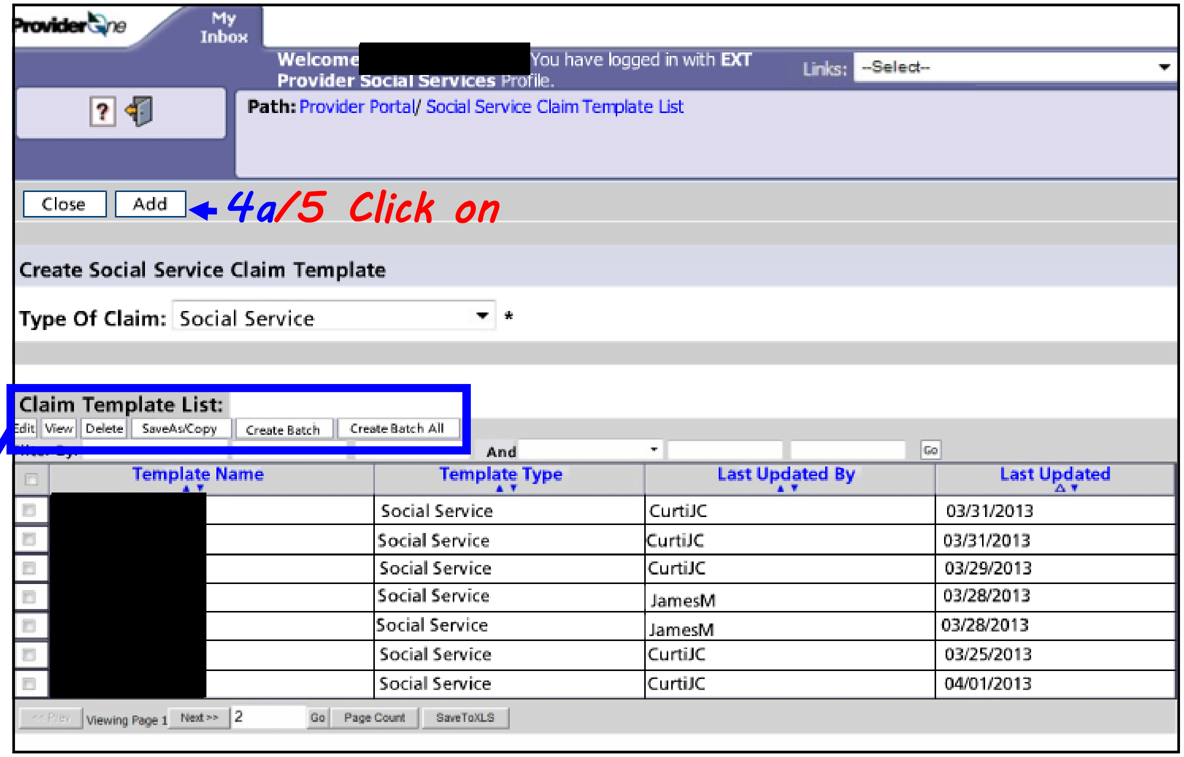
   d. Delete a template

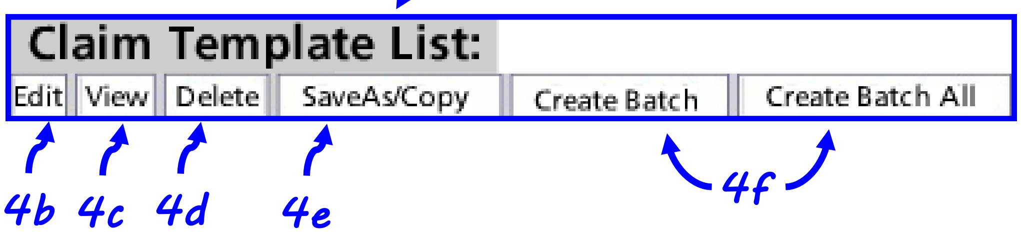
   e. Change template name or copy template

   f. Create a template batch

5. To create a new template Click on Add

Create Claim Template





Create Template

6. The Social Service Claim Template Screen appears. This page is a Basic Billing page with an added Template Name (6a) field.

7. At a minimum you must enter the top four fields to save the template

   a. Enter Template Name. You create the template name

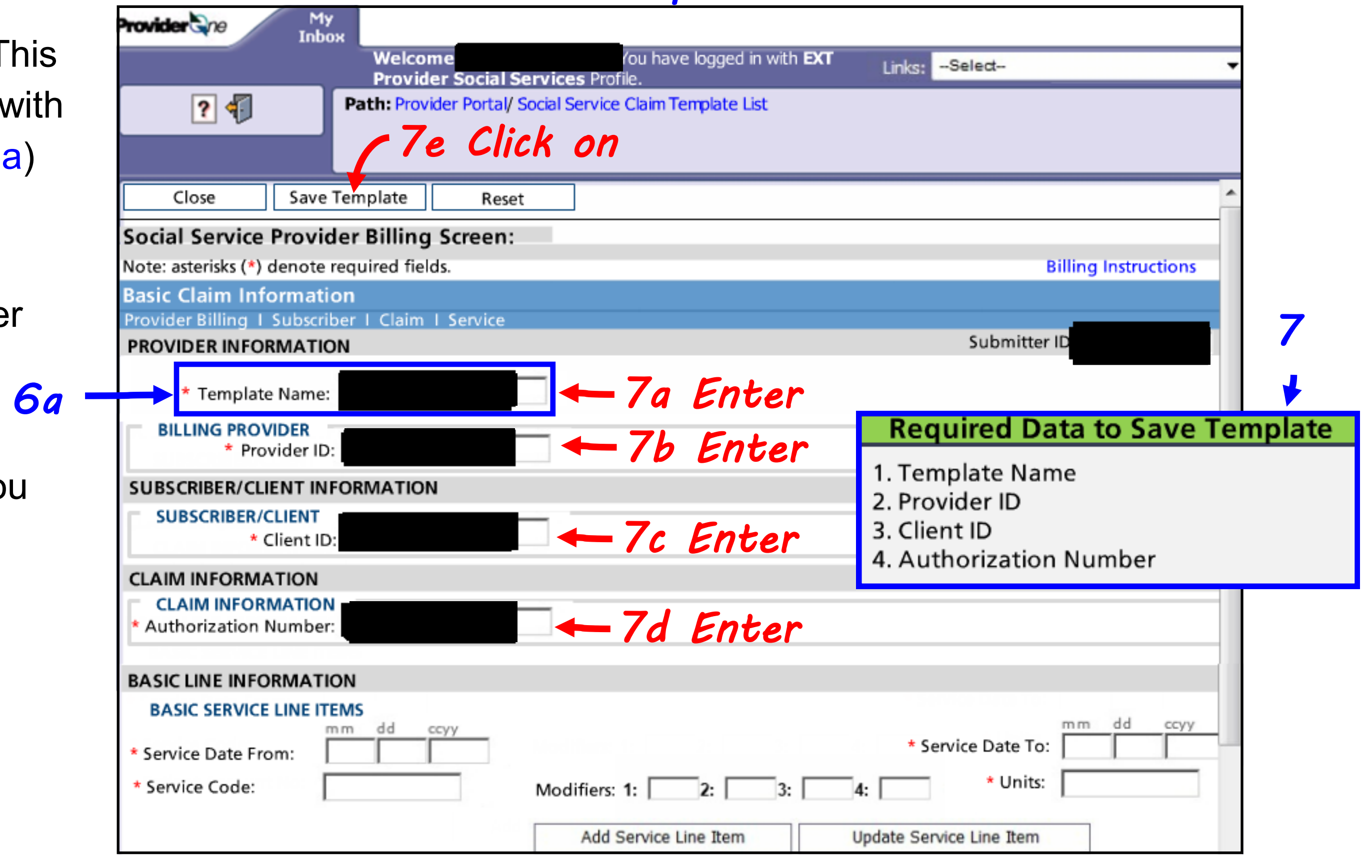
   b. Enter Provider ID from authorization

   c. Enter Client ID from authorization

   d. Enter Authorization # from Authorization

   e. To save the template. Click on Save Template

6 Social Service Claim Template Screen



Note: ProviderOne will check that the Client and Authorizations match prior to allowing you to save the template.

Template Name: You create the name. Use a name that will help you manage your templates. The example uses the clients name "Waters" and the service code (-SA420). What you use if up to you.

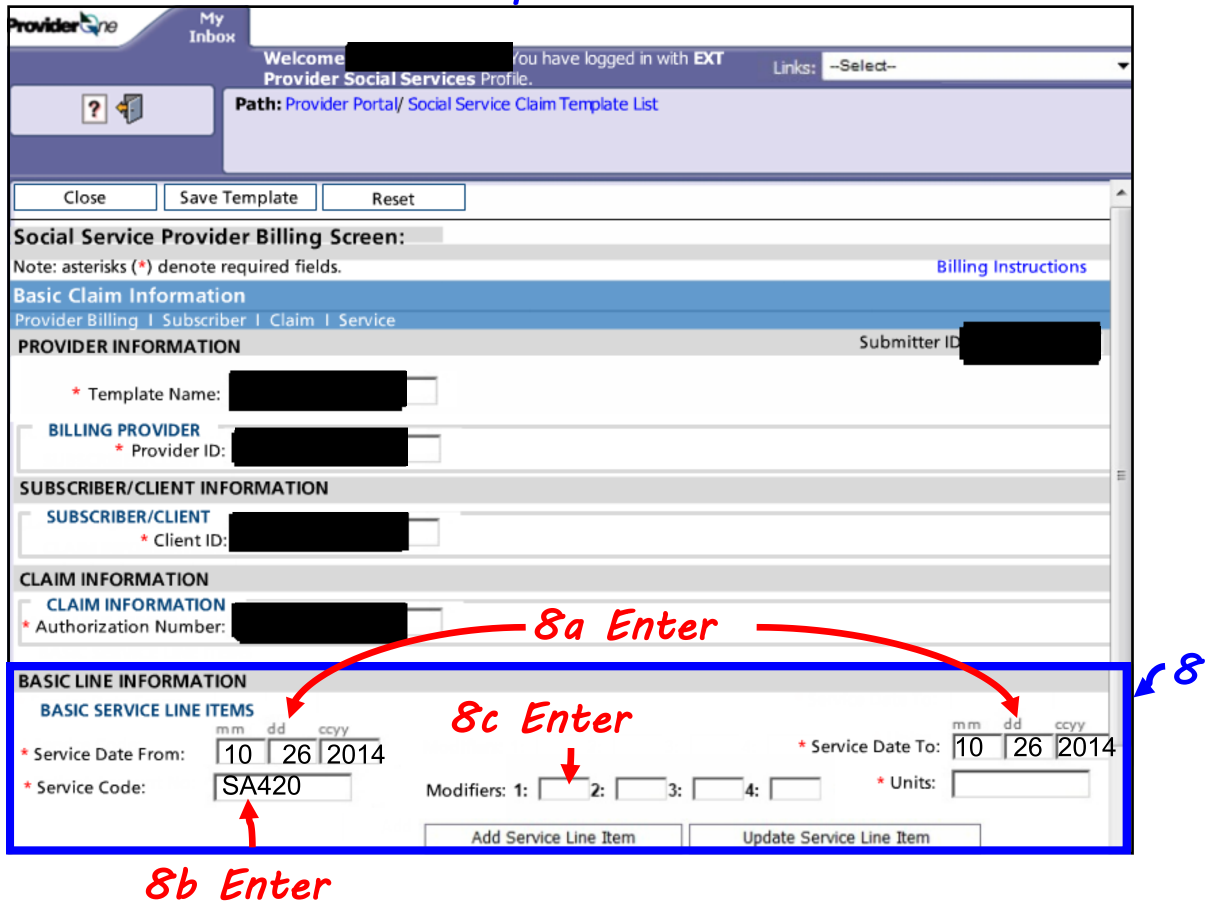
8. You can add Basic Line Information to the template prior to saving

   a. Enter Service Dates, Enter the same date (one day of service). When you use the template for billing you will always change the date

   b. Enter Service Code from authorization

   c. Enter Modifier (if applicable) from authorization

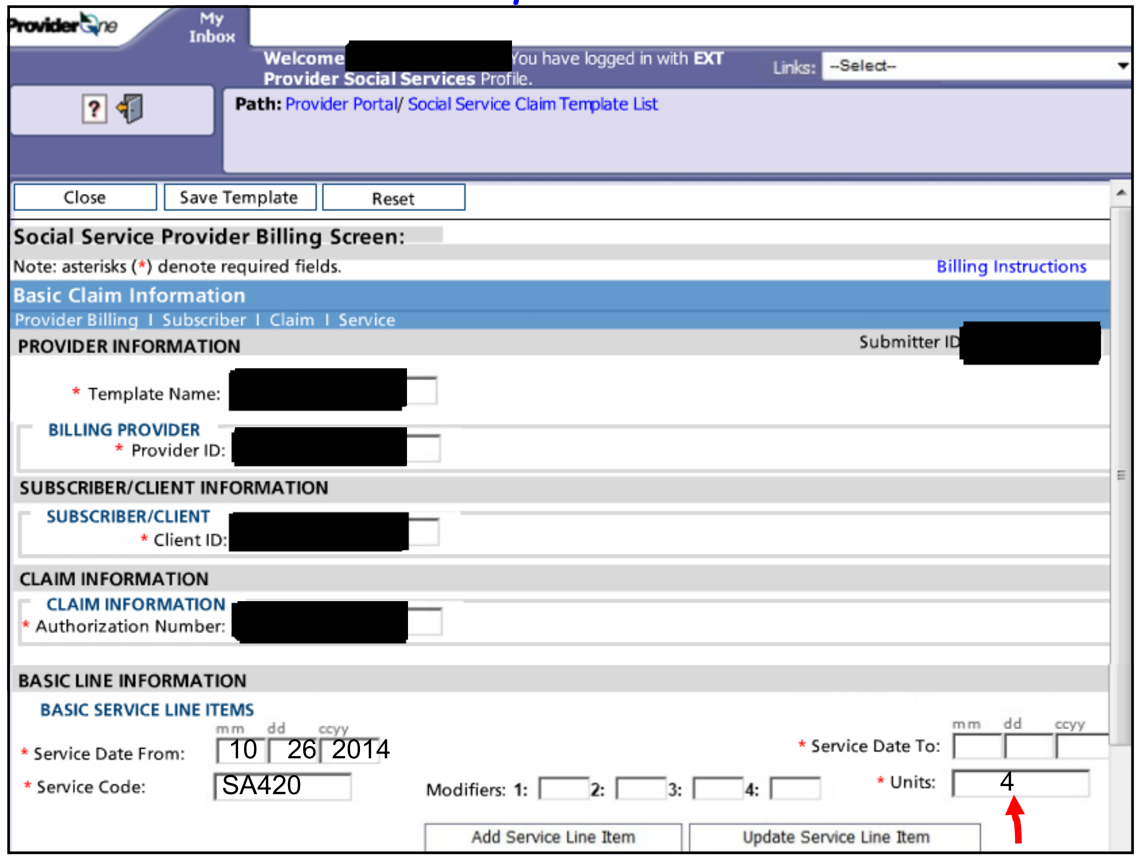
Social Service Claim Template Screen



Note: ProviderOne will not let you save the template if a date in in the future.

d. Enter number of units. See note

Social Service Claim Template Screen



8d Enter

Note: The number of units should be the number of reoccurring units for this Service Code in a <u>single day</u>. As with Basic Billing, if the claim meets the requirements to use a date range, span, then the unit number is the total days within the date range for daily unit types; or the number of months within the date range for monthly unit types.

At this point, if you will be using the template method to claim you can save the template or choose to follow the additional steps to add a service line.

e. To save the template. Click on Save Template

f. Pop-up appears

g. Click on OK

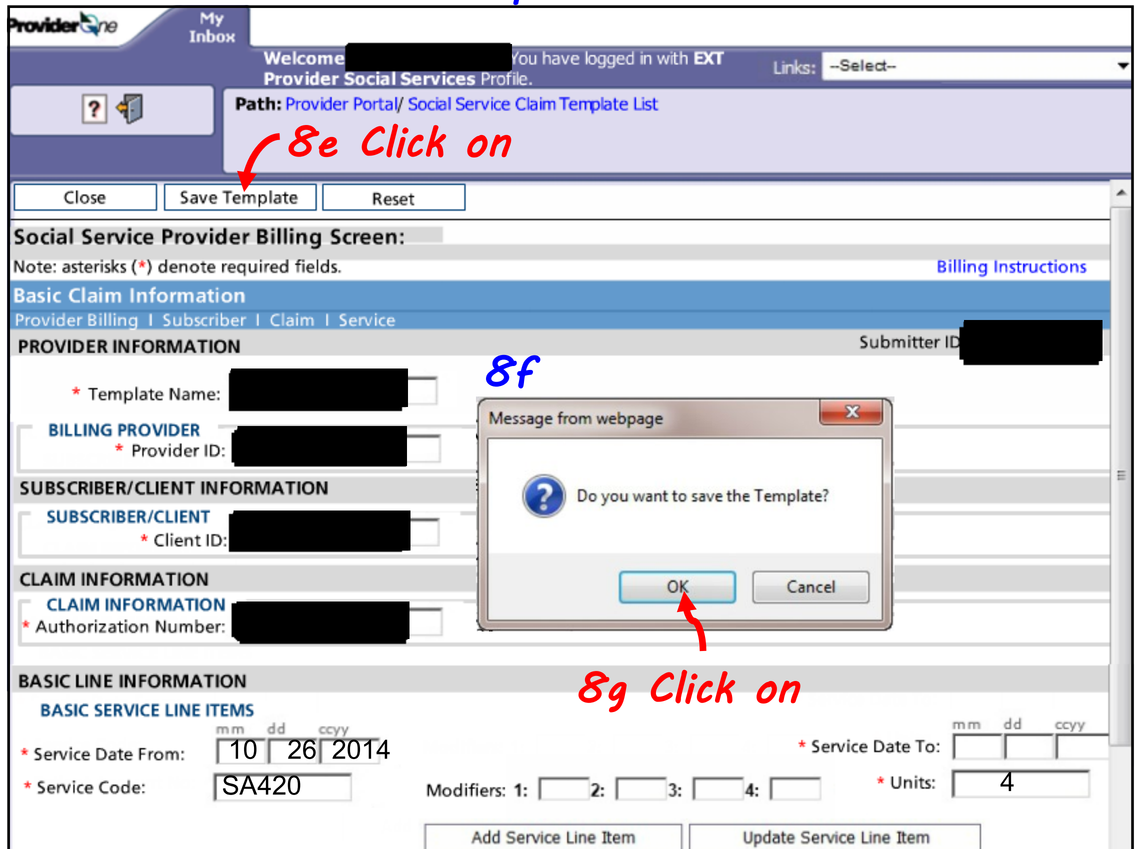
If you will be using the Batch Template method you must add the service line before you save the template to make the Batch Template process more efficient.

h. Click on Add Service Line

i. Service line appear. Follow steps e. f. and g. to save the template.

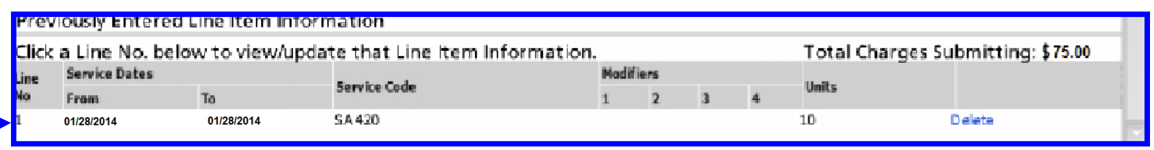
If the pop-up does not appear, see page 20 for the quick instructions on how to turn off your computer's pop-up blocker.

Social Service Claim Template Screen



8h Click on

8f



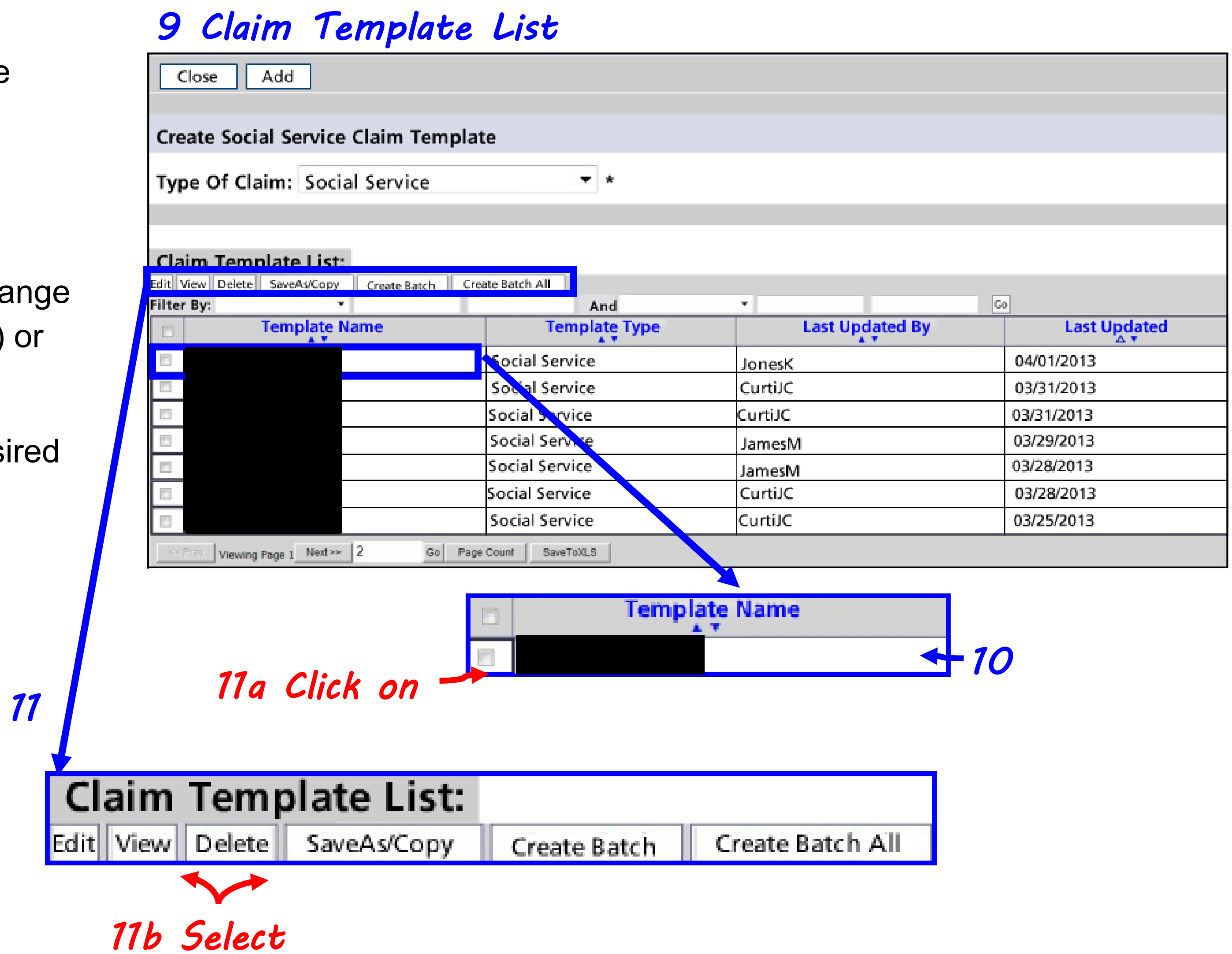
9. Claim Template List page appears

10. Showing New template

11. To Edit, View, Delete, change template name (SaveAs) or Copy a template:

   a. Click on ☐ next to desired template name

   b. Select action

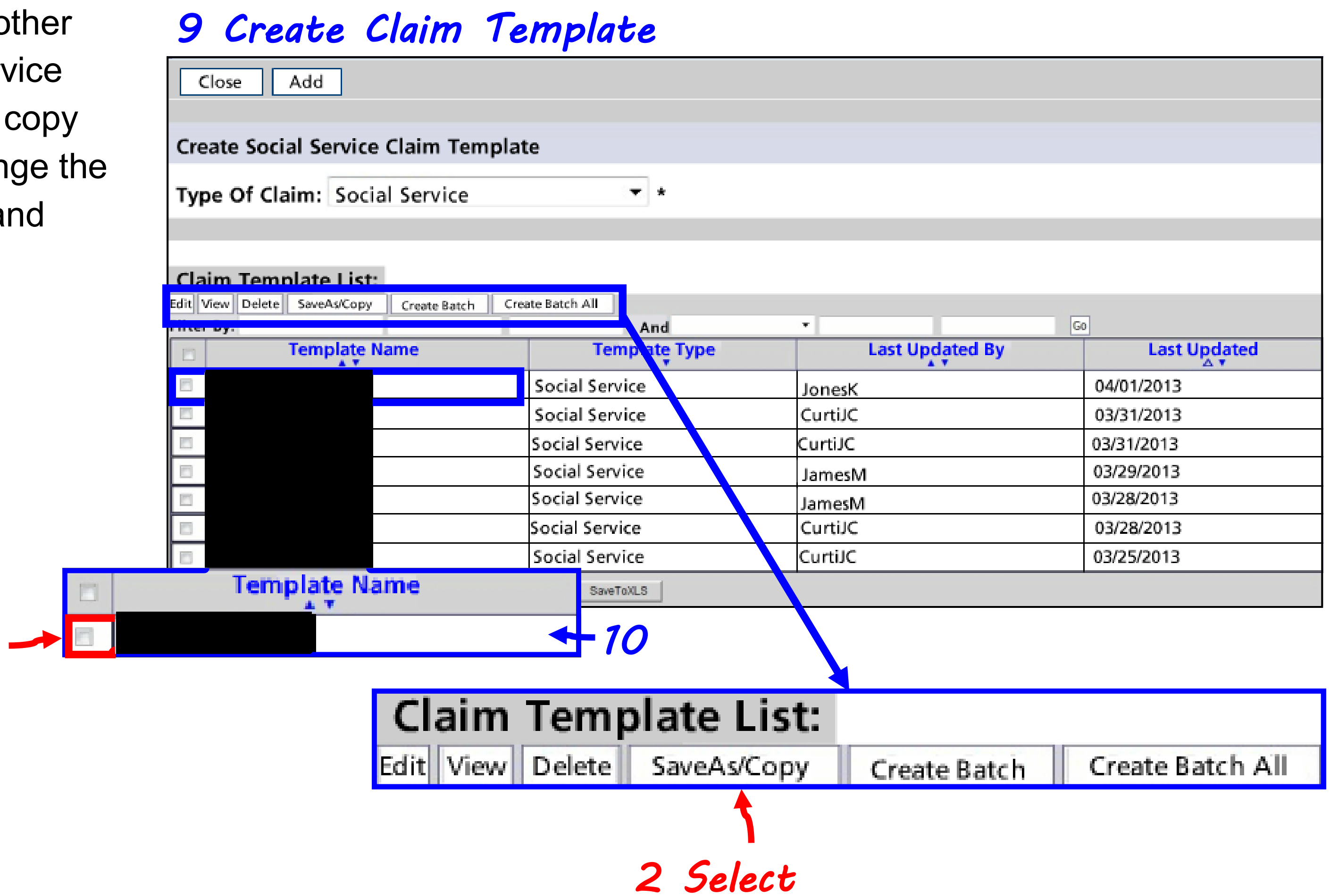


Copy Template

Time saving tip: To make other templates with the same service information you can make a copy of an existing template, change the client information, rename, and save.

1. Click on box next to desired template name

2. Click on SaveAs/Copy



Copy Template

3. Template appears

4. Change Template Name

5. Change Client ID

6. Change Authorization Number

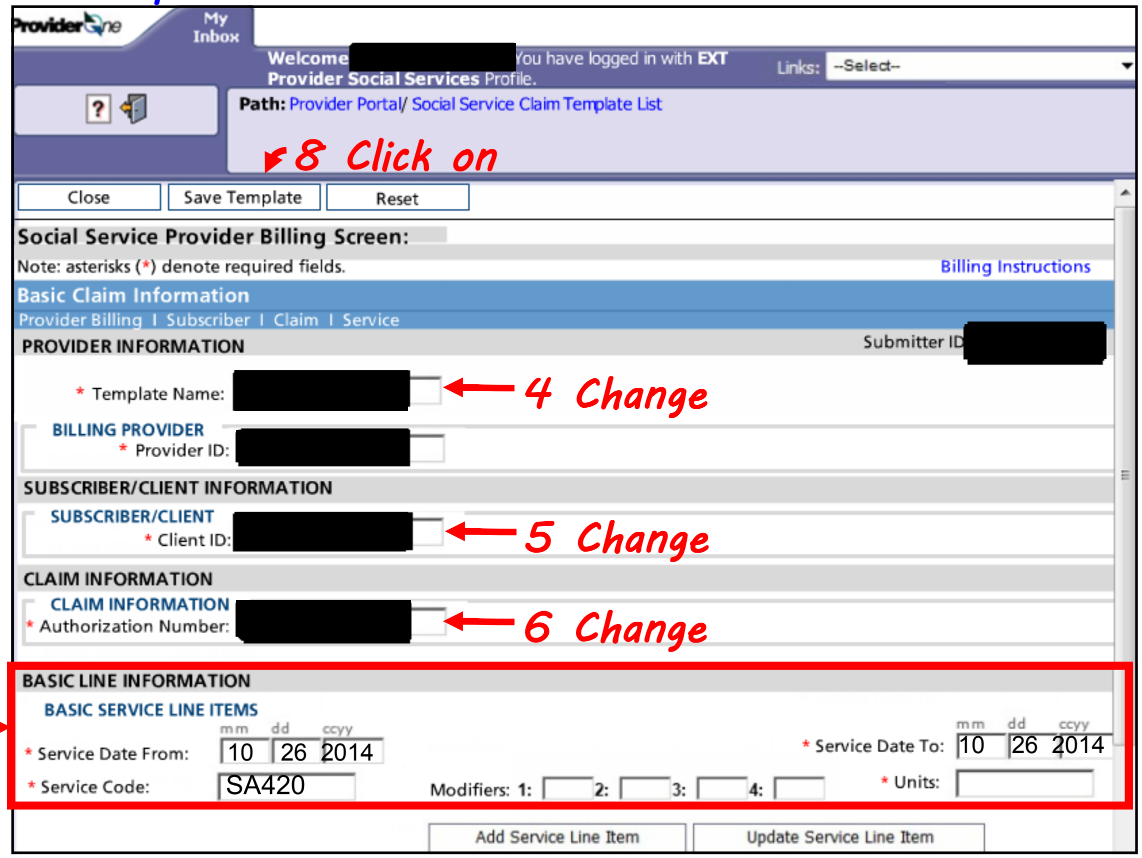
7. Change information (including service line, if applicable) needed

8. Click on Save Template

9. Pop-up appears

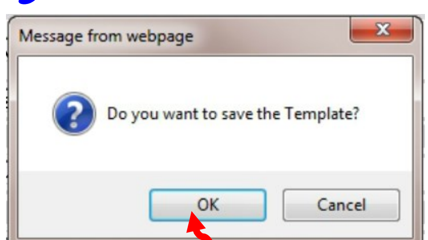
10. Click on OK

3 Template



7 Change (if needed)

9

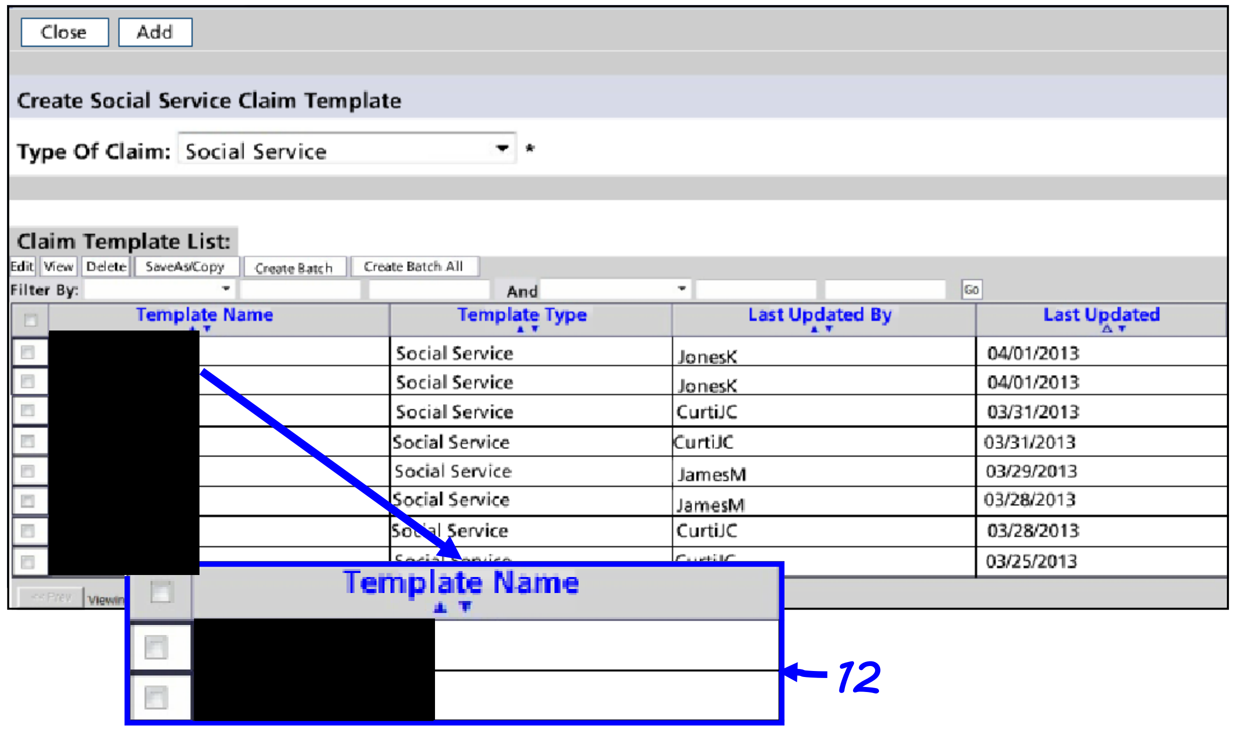


10 Click on

11. Create Claim Template page appears

12. Showing new template and that the original template is still available

11 Create Claim Template



Submit Claim Using a Template

This section is on how to submit a claim using a saved template.

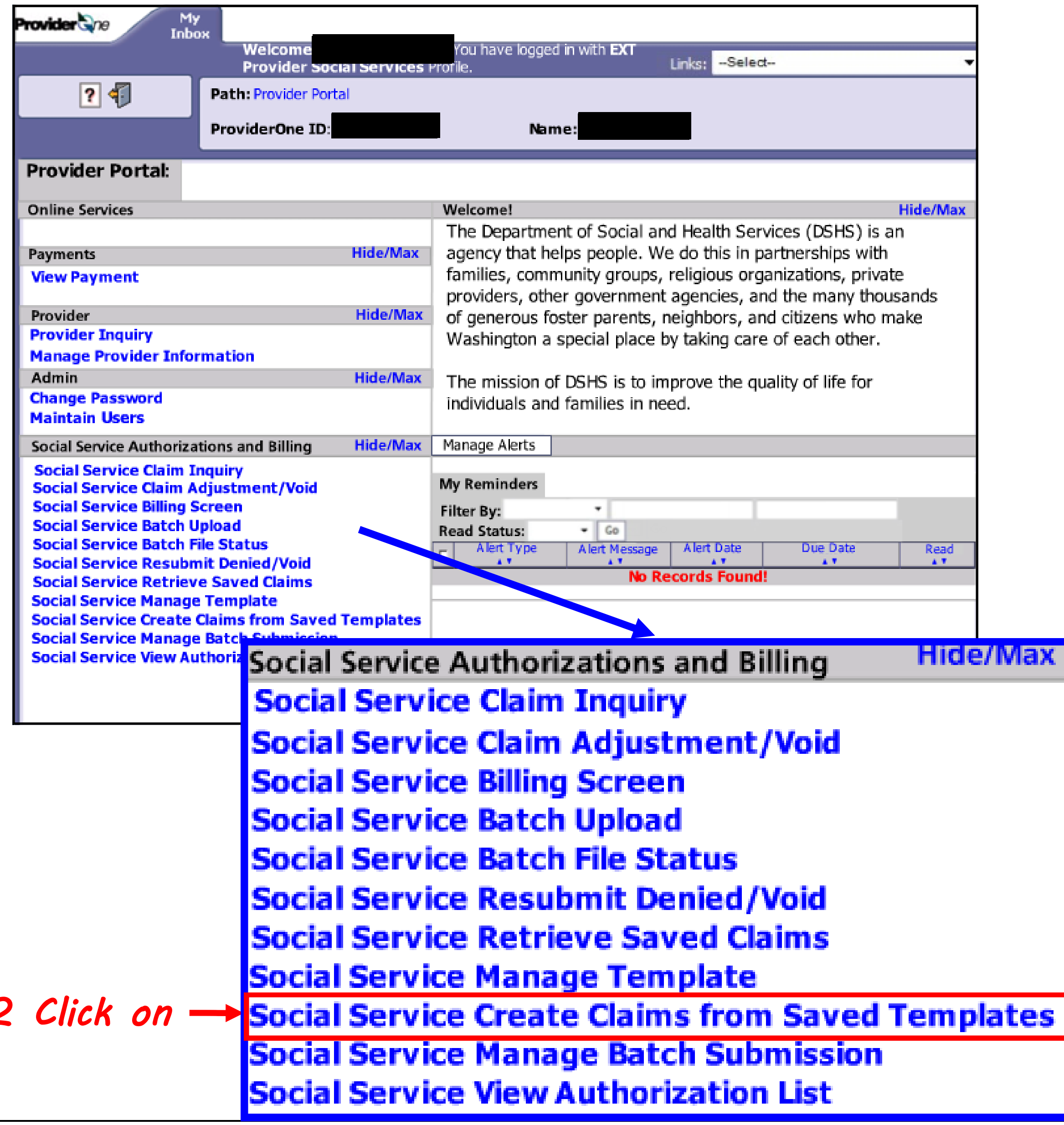
1. From the Provider Portal

2. Click on Social Service Create Claims from Saved Templates

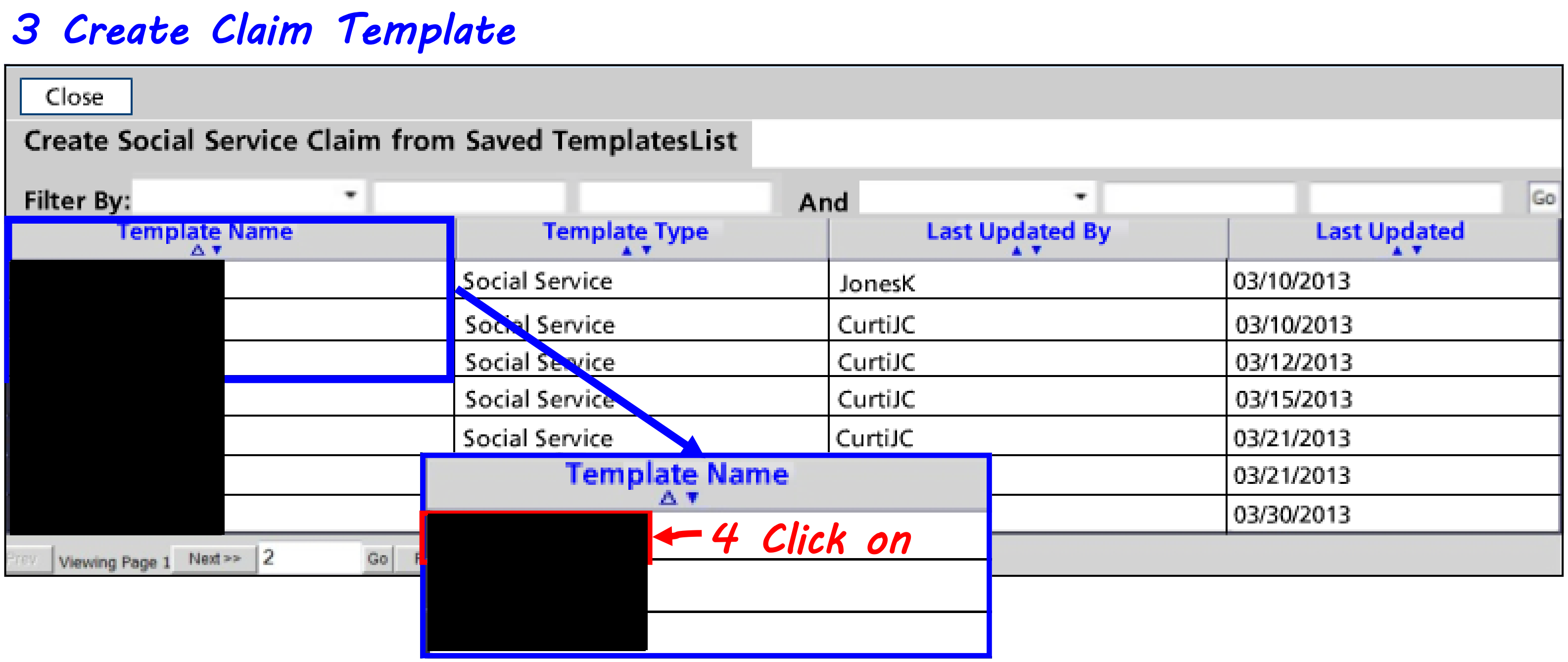
You must turn off your pop-up blocker before you begin billing.

See page 20 for the quick instructions on how to turn off your computer's pop-up blocker.

1 Provider Portal



3. Create Social Service Claim from Saved Templates page appears



4. Click on desired template name

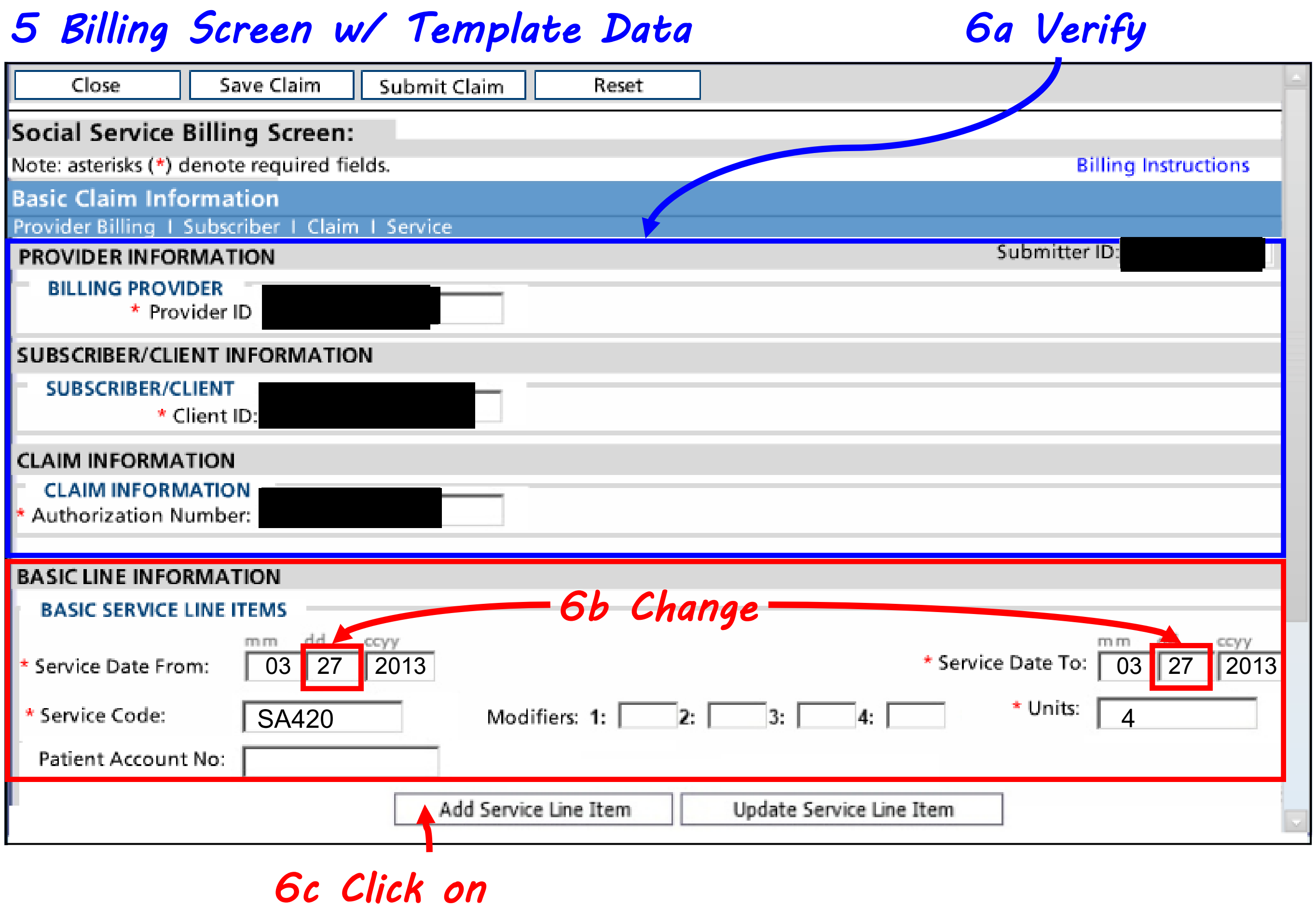
5. The Billing Screen appears with template data

6. To submit a claim, use the same process as Basic Billing

   a. Verify Information

   b. Change data for this claim. i.e. date of service

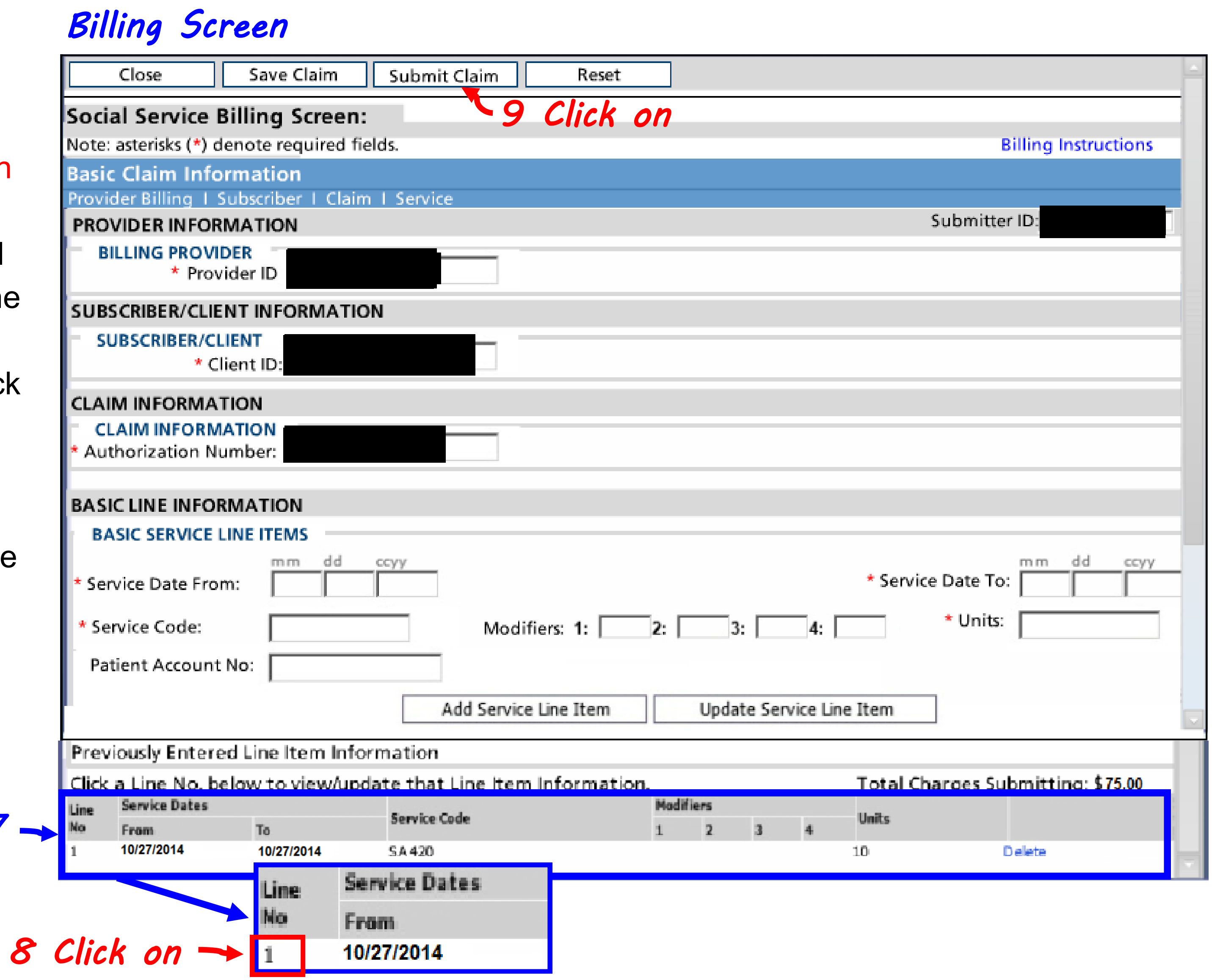
   c. Click on Add Service Line. You can add additional Service Lines for this Authorization



7. Service Line appears

8. As with Basic Billing, you can add Service Lines for this authorization. Click on the Line Number of a Service Line and it will populate the Basic Line information. Change the claim data and click on Add Service Line. After the new Service Line appears you can add more or submit the claim.

9. Click on Submit Claim

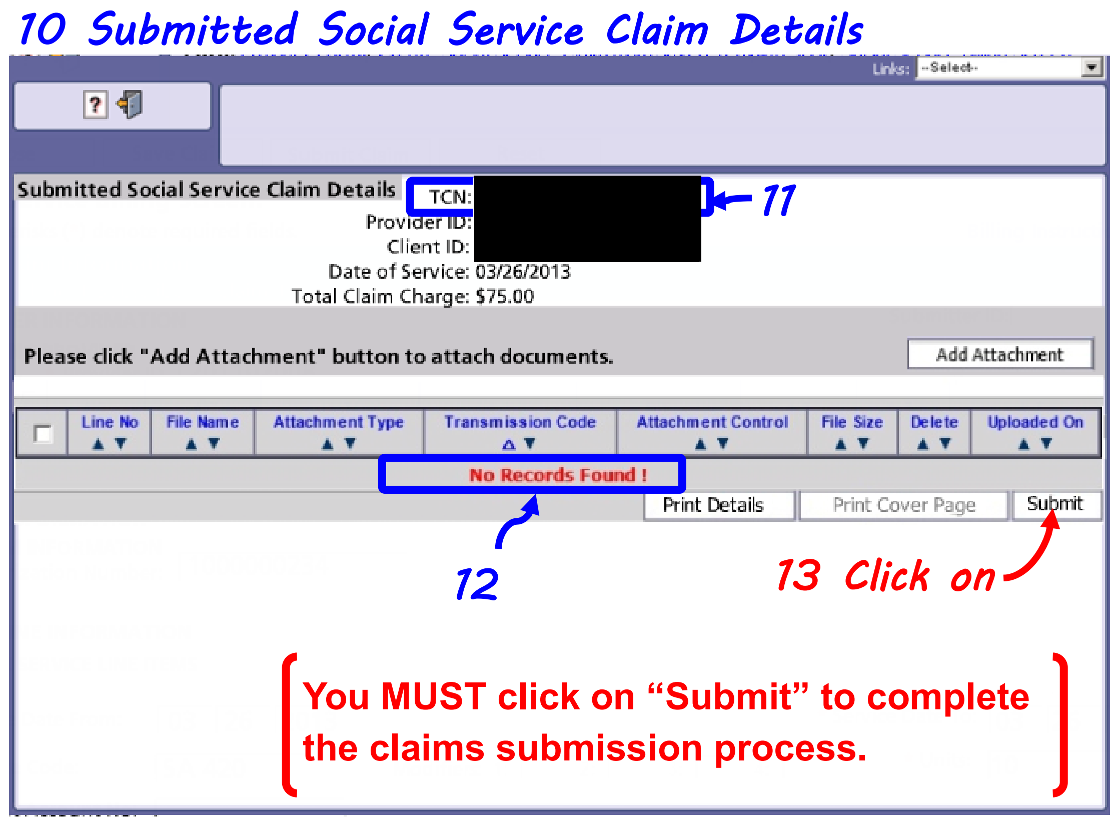


10. Submitted Social Service Claim Details pop-up appears See note

11. The Transaction Control Number (TCN) appears

12. No Records Found means that this claim has no attachment. Never add attachments.

13. Click on Submit



Note: If the pop-up page does not appear, it means that your "Pop-up Blocker" has not been turned off and you need to close this billing page.

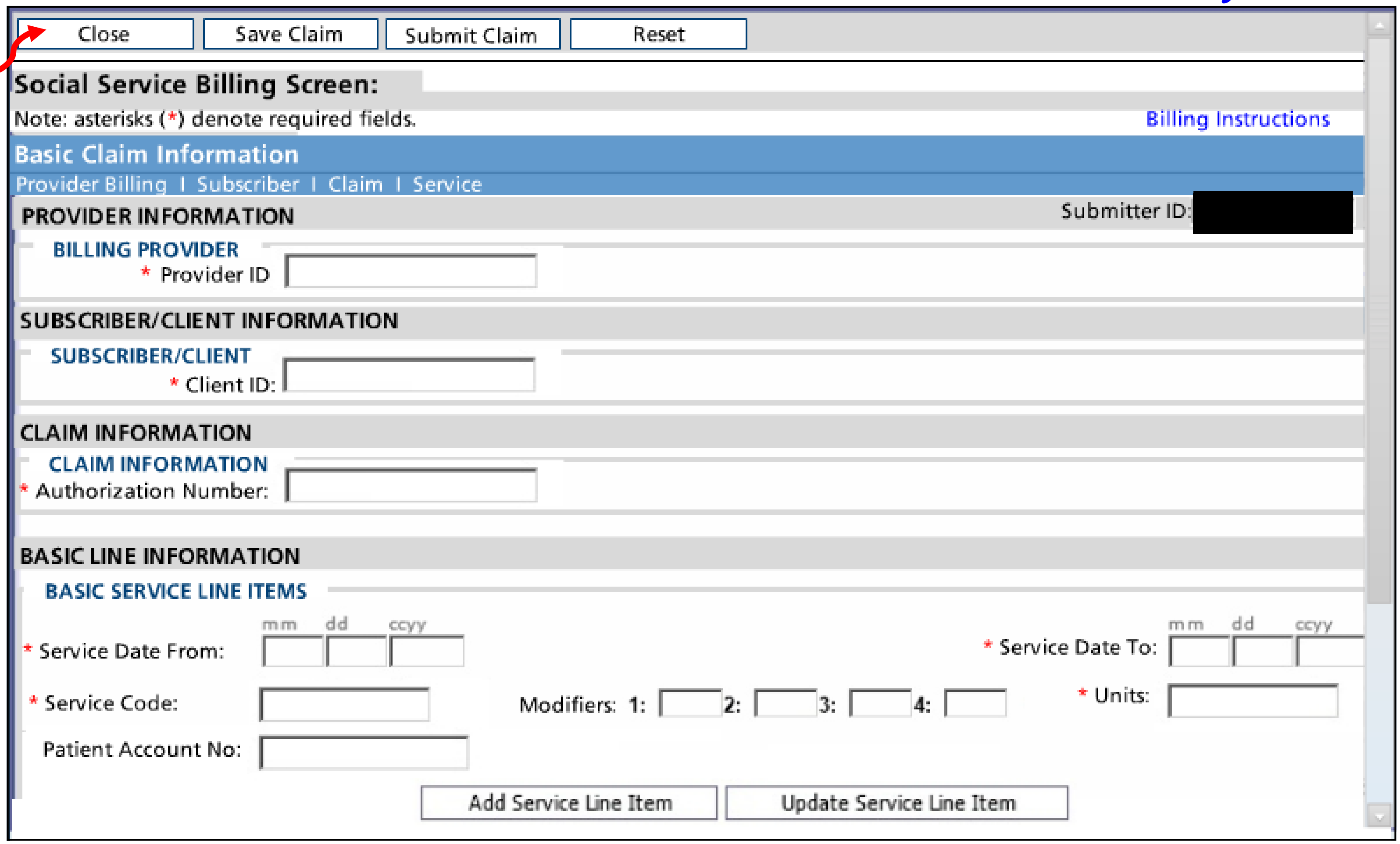
See page 20 for the quick instructions on how to turn off your computer's pop-up blocker. Then return to the billing page to submit a claim.

14. Blank Social Service Billing Screen appears

15. Click on Close

14 Social Service Billing Screen

15 Click on



16. Create Social Service Claim from Save Template appears

17. Select an new template

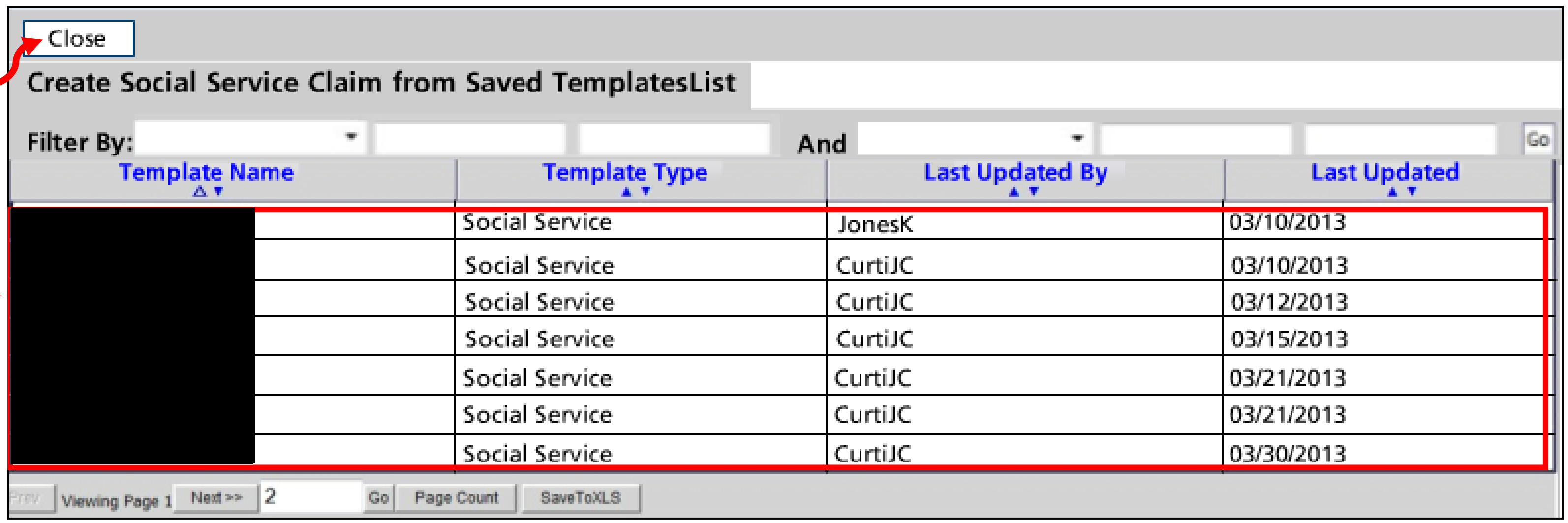
or

18. Click on Close to return to Portal Page.

16 Create Social Service Claim from Saved Template

18 Click on

17 Select

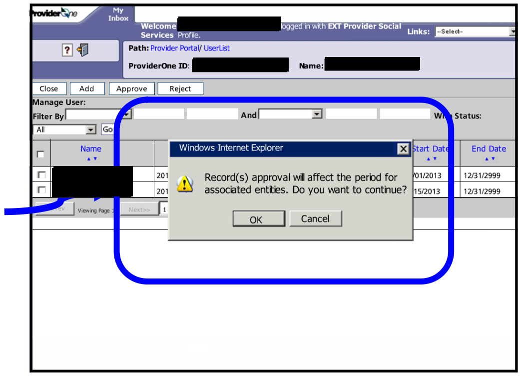


Template Name	Template Type	Last Updated By	Last Updated
[redacted]	Social Service	JonesK	03/10/2013
	Social Service	CurtiJC	03/10/2013
	Social Service	CurtiJC	03/12/2013
	Social Service	CurtiJC	03/15/2013
	Social Service	CurtiJC	03/21/2013
	Social Service	CurtiJC	03/21/2013
	Social Service	CurtiJC	03/30/2013

Pop-Up Blocker

ProviderOne uses “Pop-Up Windows” (small screens or windows that appear in front of the window you are viewing). For ProviderOne to work, your computer must be set to allow pop-up windows. Different computers have different method to turn off the pop-up blocker, here are two common approaches.

Pop Up Window



Option 1:

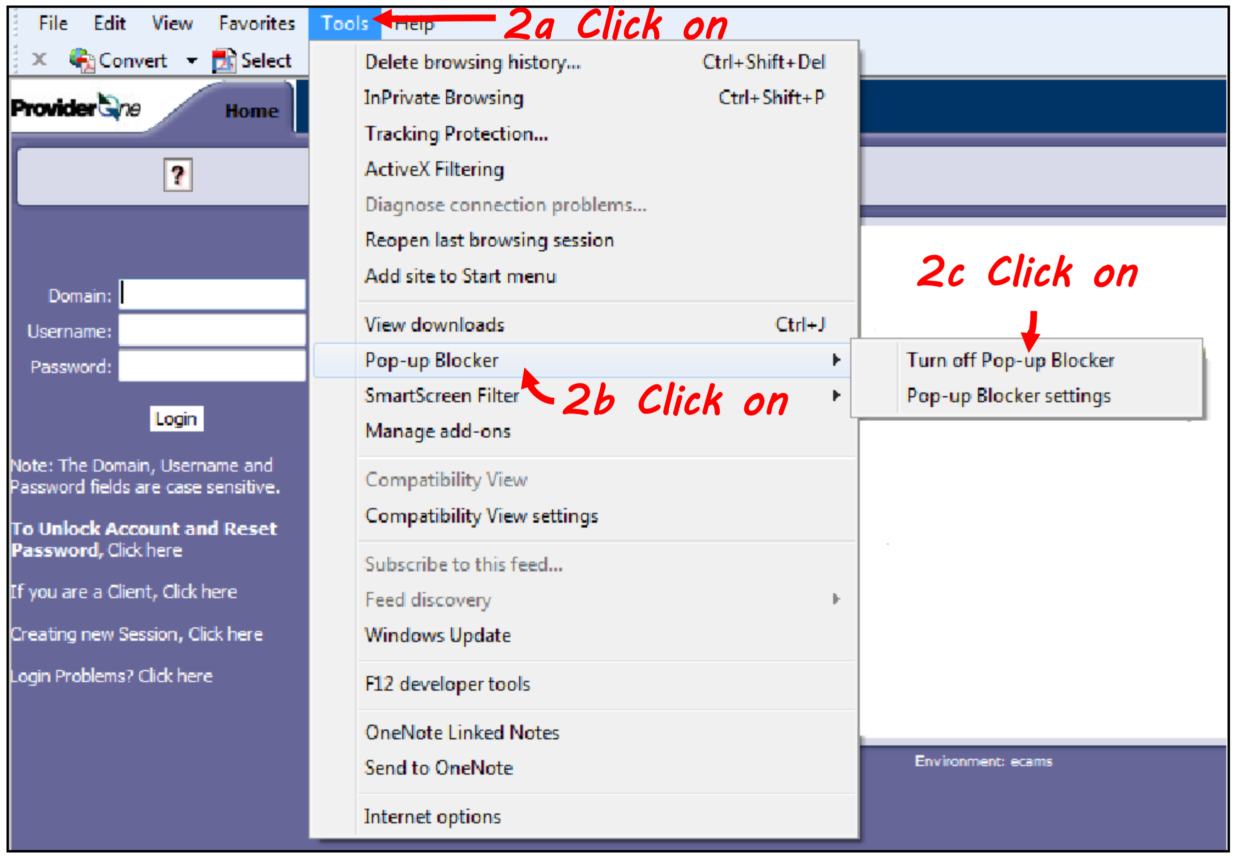
1. From an internet page

2. Turn off pop-up blocker
   a. Click on Tools
   b. Click on Pop-up Blocker
   c. Click on Turn Off Pop-up Blocker

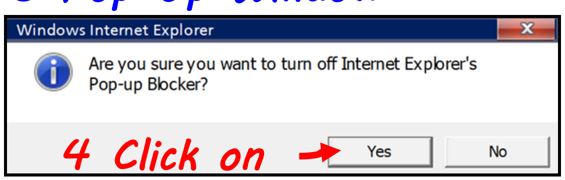
3. Pop-up window appears

4. Click on Yes

1 Internet Page



3 Pop Up Window



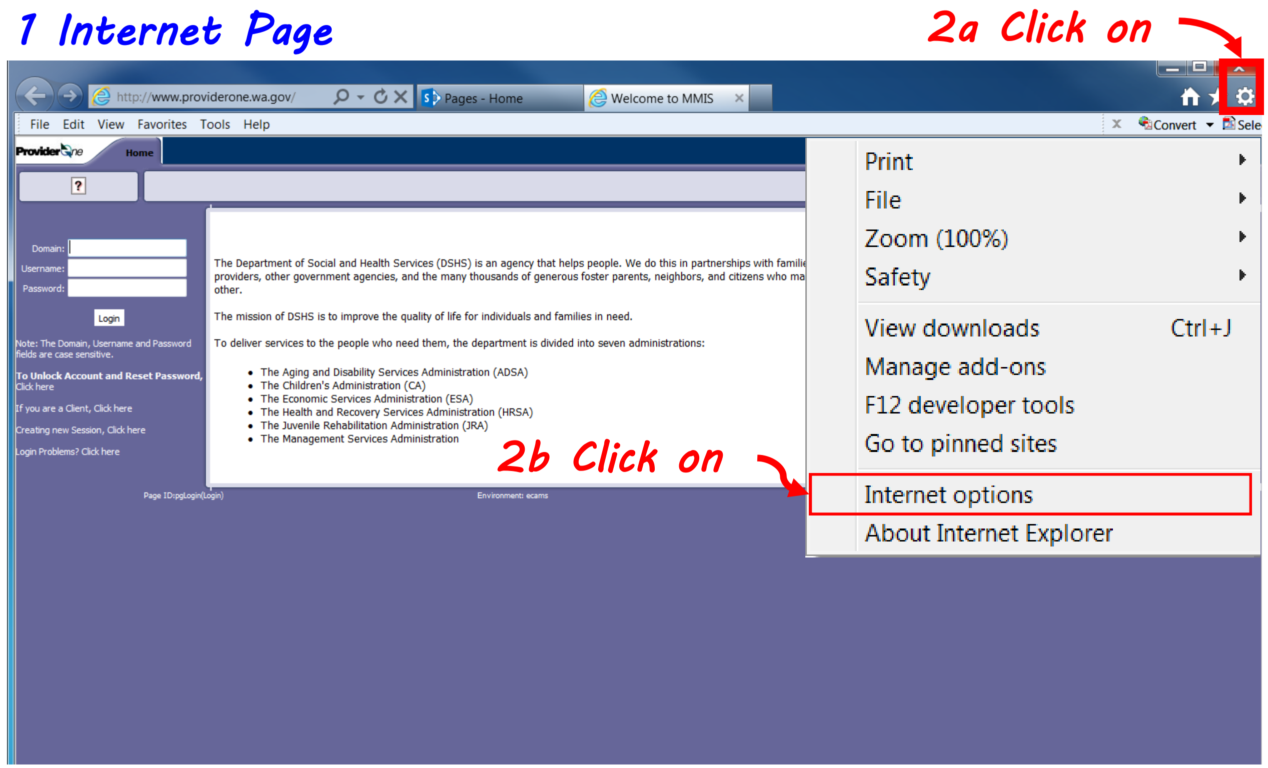
Pop-Up Blocker

Option 2:

1. From an internet page

2. Turn off pop-up blocker
   a. Click on 

   b. Click on Internet Options

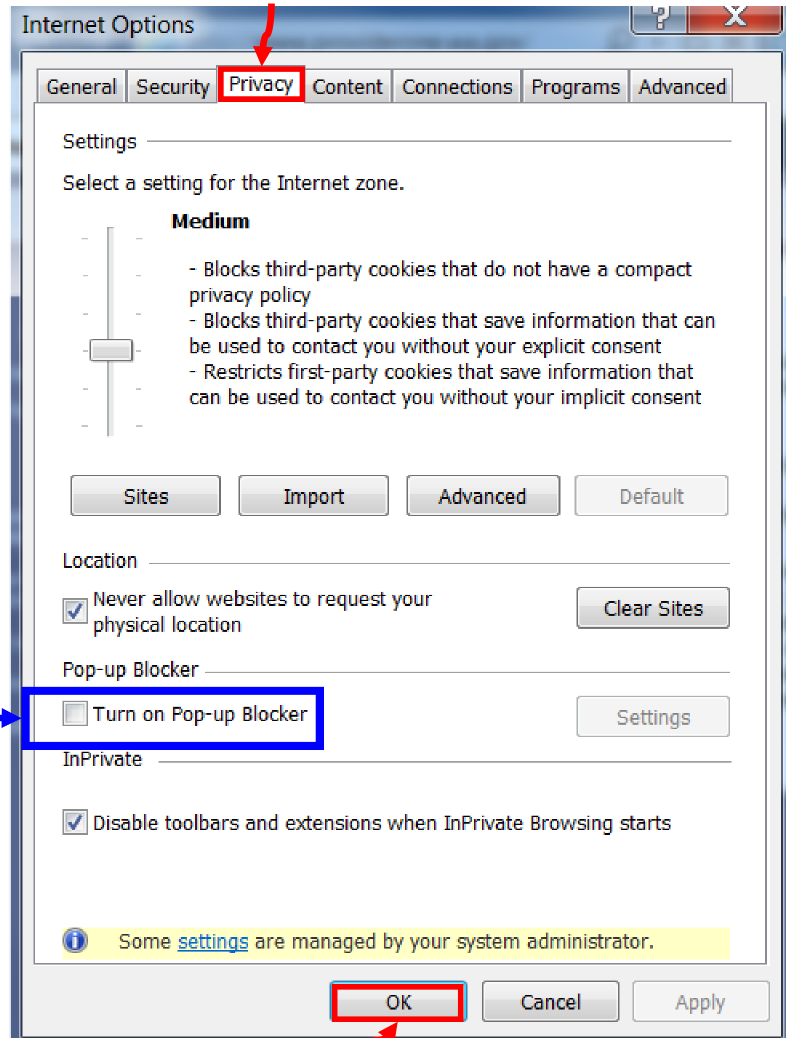


Option 2 (cont.):

- **c.** Internet Options appears
- **d.** Click on Privacy
- **e.** The should be empty.
- **f.** If the is click on the box to remove the check
- **g.** Click on Privacy

2d Click on

2c Internet Options



2e/2f

2g Click on