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.

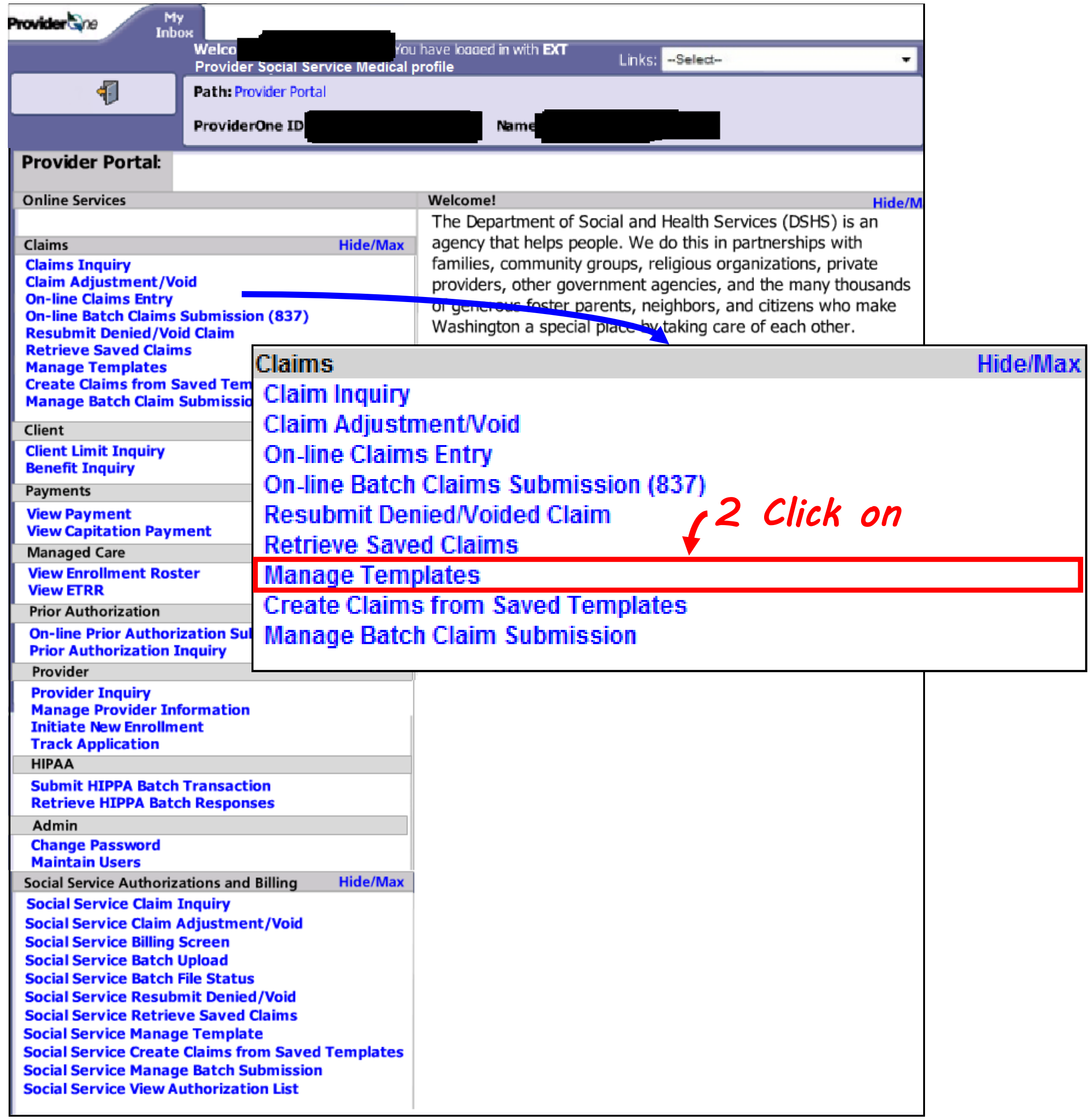
Create Template

This section is on how to create a saved template.

1. From the Provider Portal

2. Click on Manage Template

1 Provider Portal



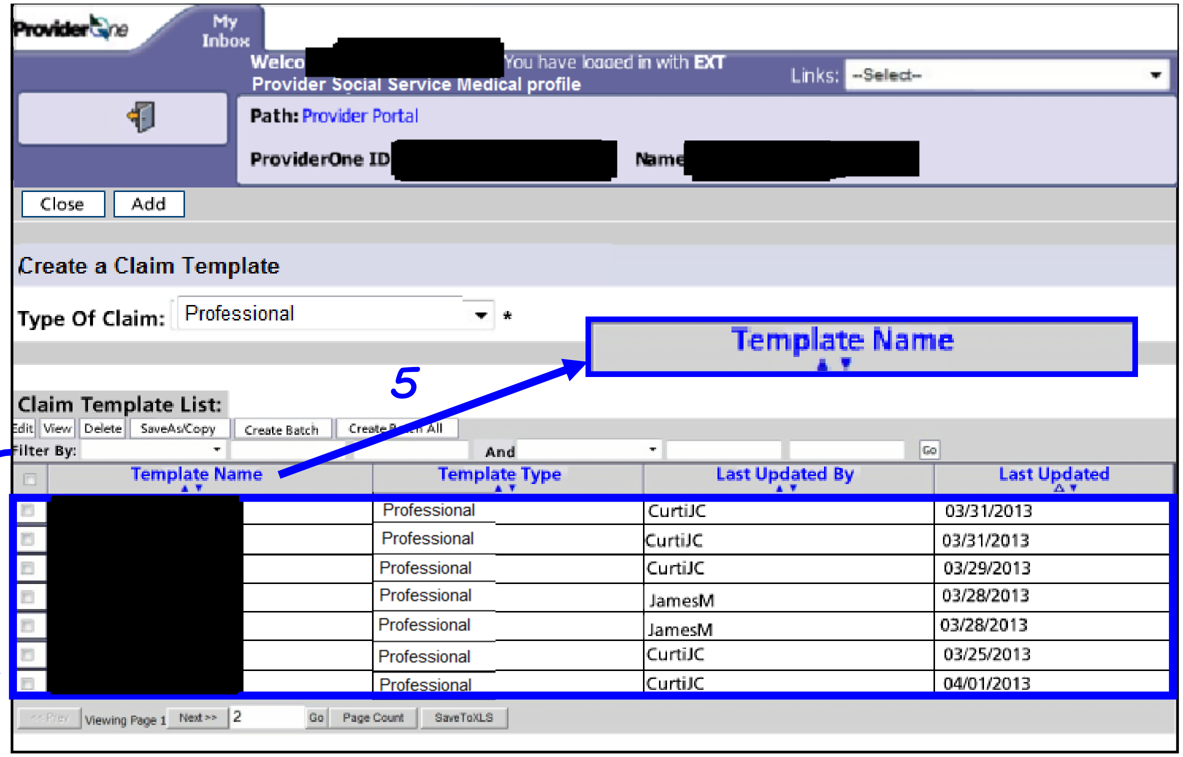
Create Template

3. The Create a Claim Template appears showing all the saved templates (3a) within your domain

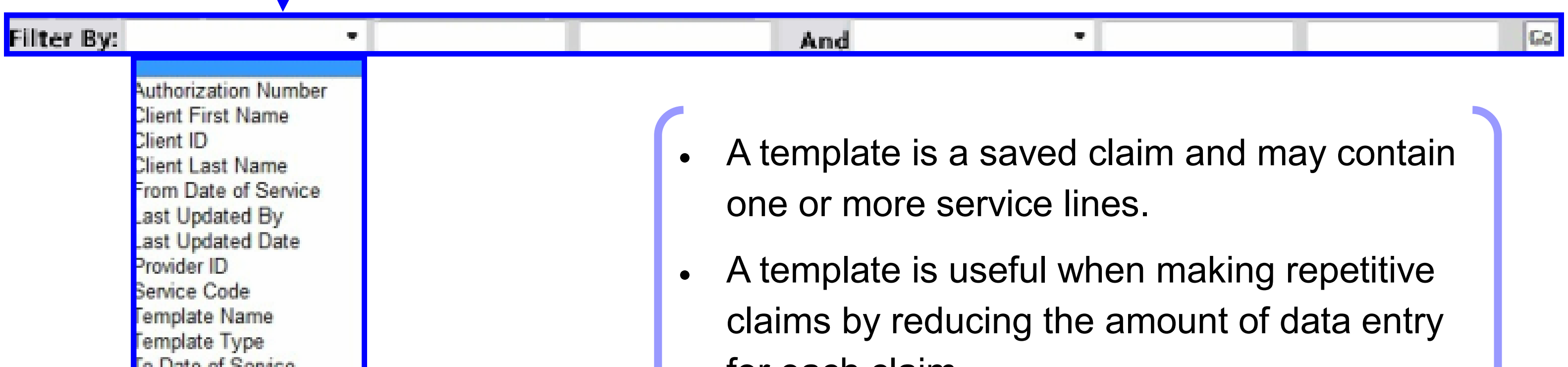
4. If you have a lot of templates you can use the filters to find a template

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

3 Create a Claim Template



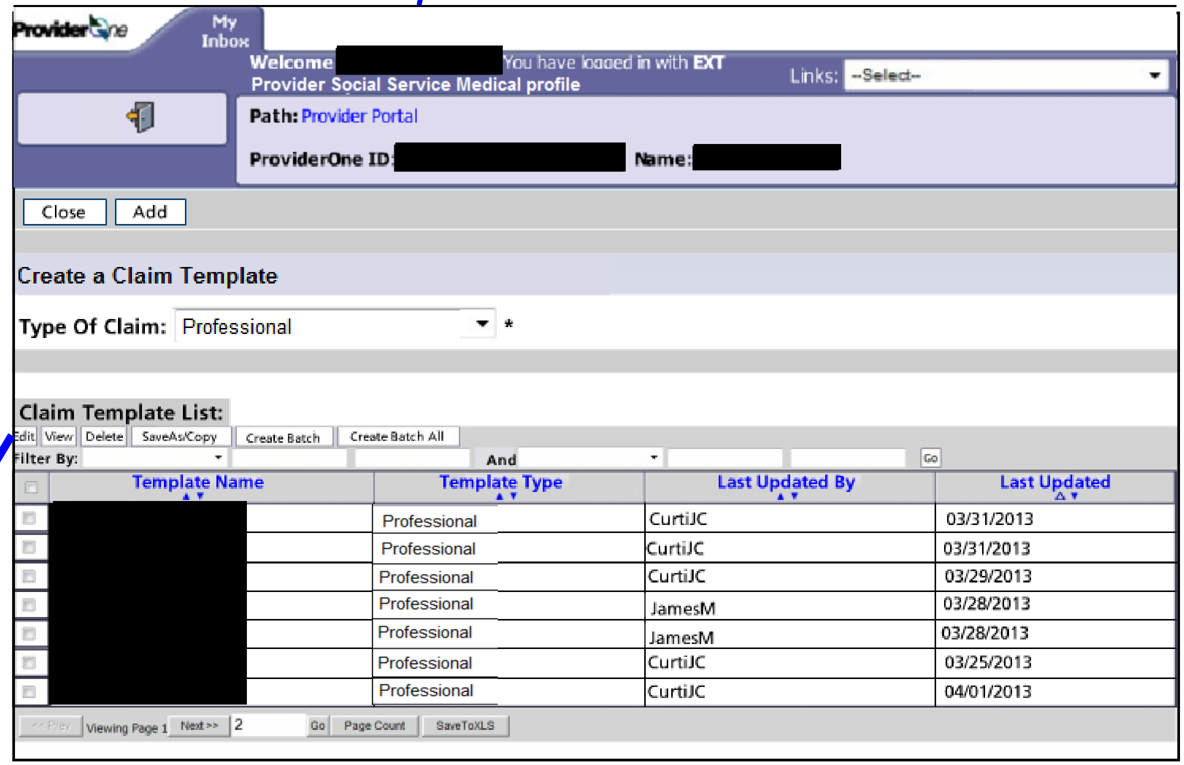
4

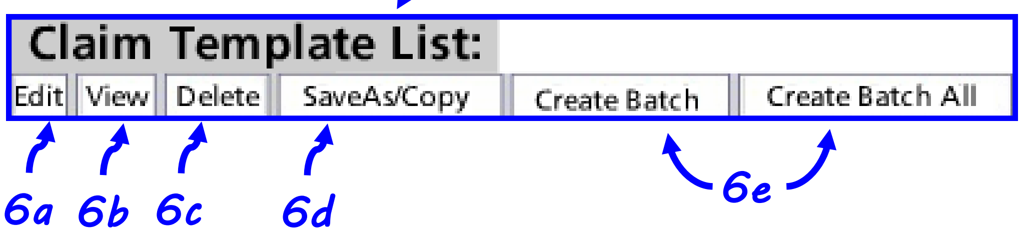


- A template is a saved claim and may contain one or more service lines.
- A template is useful when making repetitive claims by reducing the amount of data entry for each claim.

6. The page is used to:
   a. Edit a saved template
   b. View a saved template
   c. Delete a template
   d. Change template name or copy template
   e. Create a batch or group of templates

Create a Claim Template





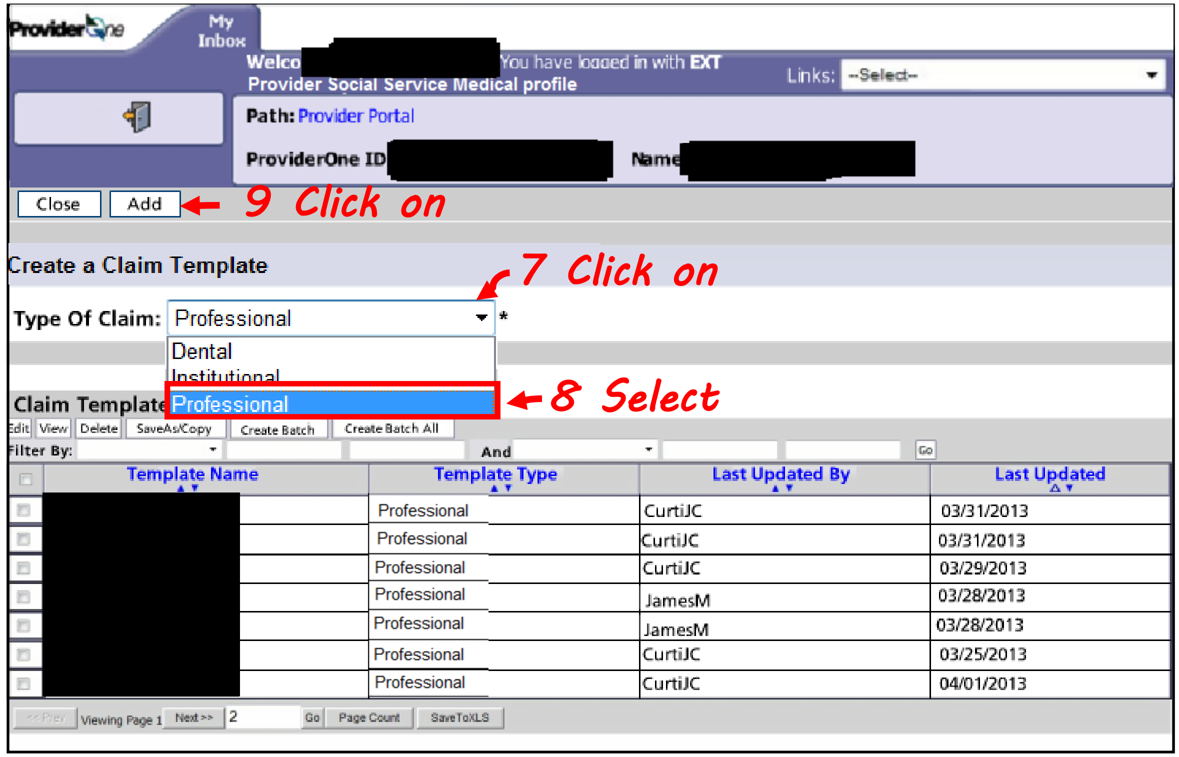
Create Template

7. To create a template click on ▾ to show menu

8. Select Professional

9. To create a new template click on Add

Create a Claim Template

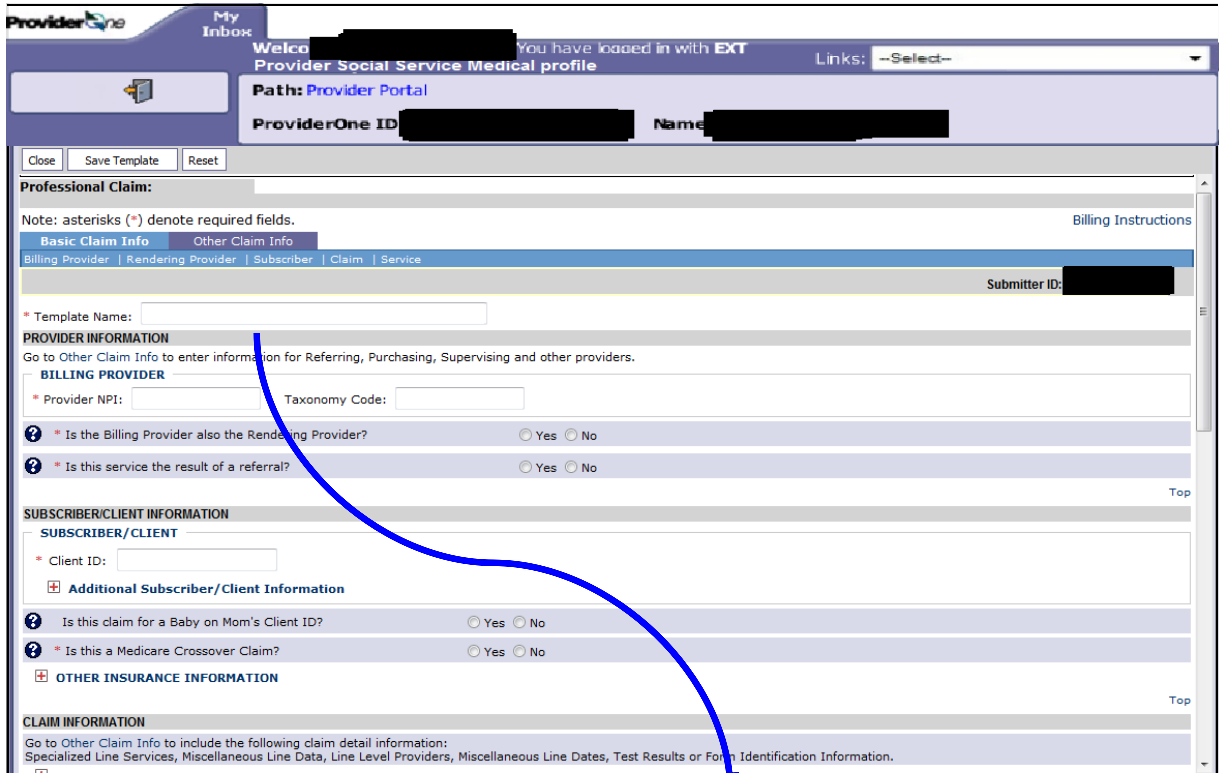


10. The Professional Claim screen appears. This page is a Professional Billing page with an added Template Name field

11. Enter a template name (required)

Template Name: You create the name. Use a name that will help you manage your templates. The example uses the clients name “Waters”. What you use if up to you.

10 Professional Claim (Template)

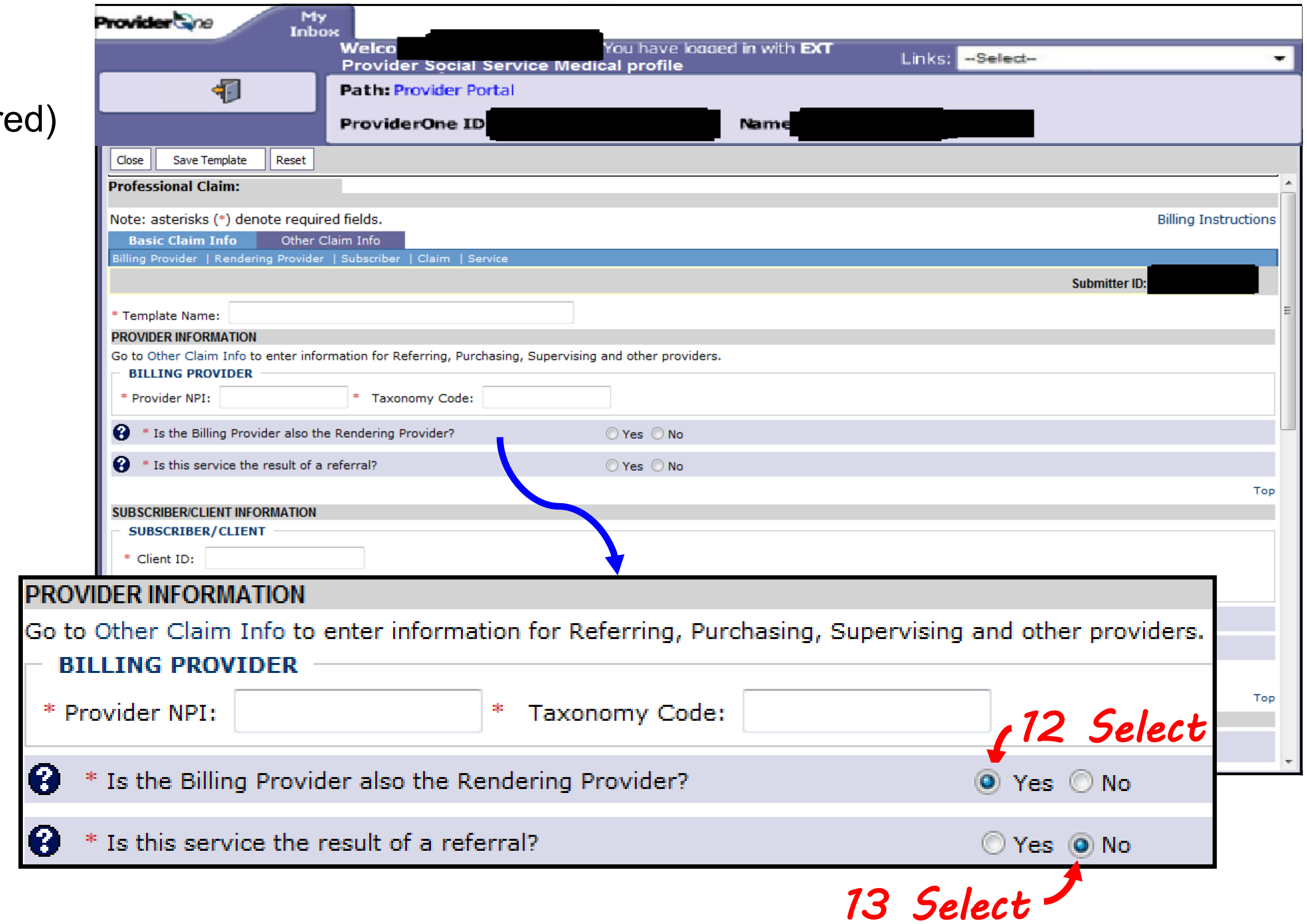


11 Enter

12. Select Yes for Rendering Provider (required)

13. Select No for Referral (required)

Professional Claim (Template)

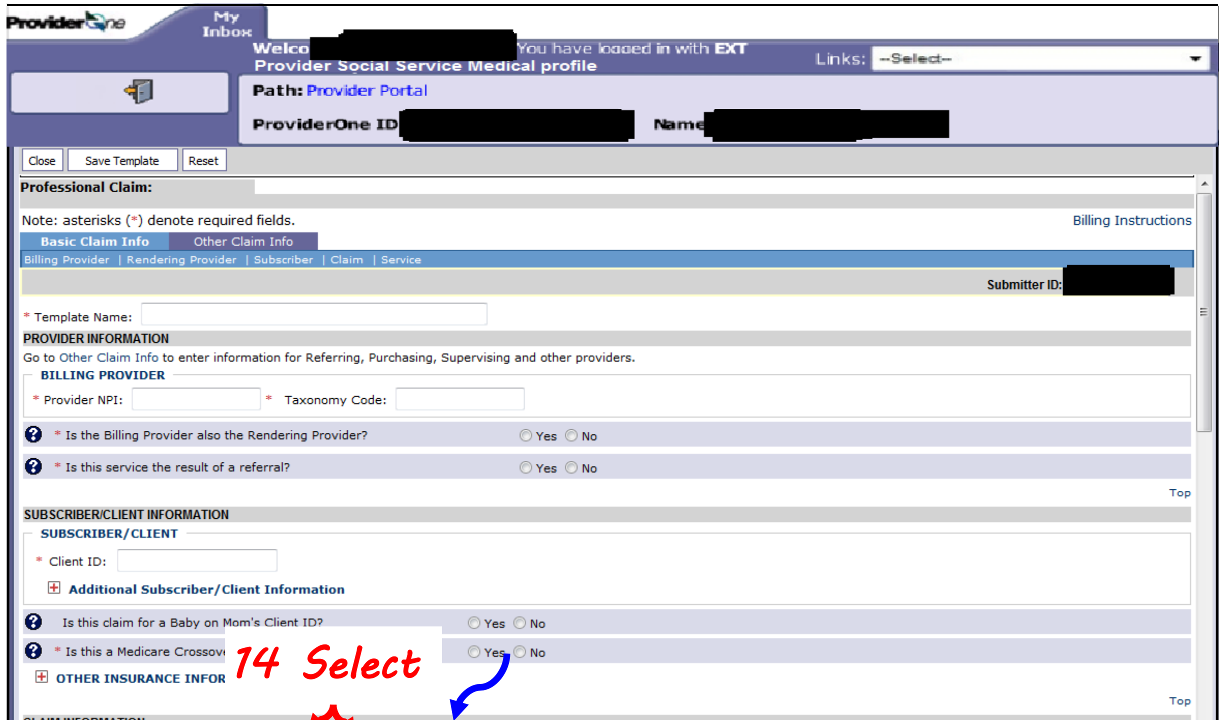


Please note: The following instructions are for creating a template with the minimum number of entries needed to save the template. Most provider will want to add as much information as possible to the template to reduce the amount of data entry at billing. It is recommended that at this point you use the Social Service Medical How Too Guide to completely fill in the repetitive claims information in the template then return to this How Too starting on page 10.

14. Select for Baby on Mom's Client ID (required)

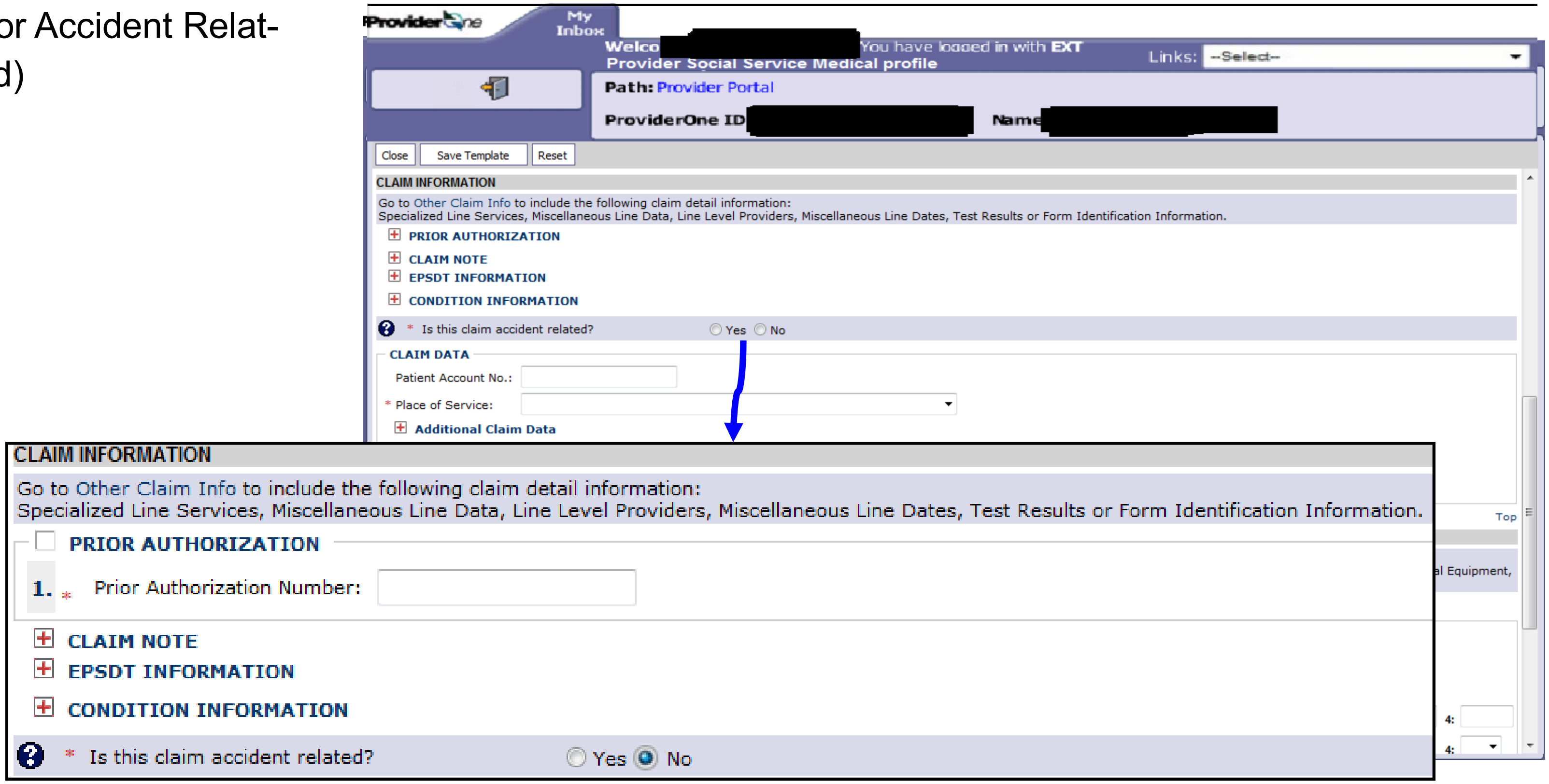
15. Select No Medical Crossover Claim (required)

Professional Claim (Template)



16. Select No for Accident Related (required)

Professional Claim (Template)



16 Select

At this point you have entered the minimum required information needed to save a template. Follow the steps on the next page to save the template.

You can add more information: Follow the instructions in the Social Service Medical Basic Billing How To Guide and enter all the information for a repetative claim. Once you have filled in all the repetitive information, follow the steps on the next page to save the template.

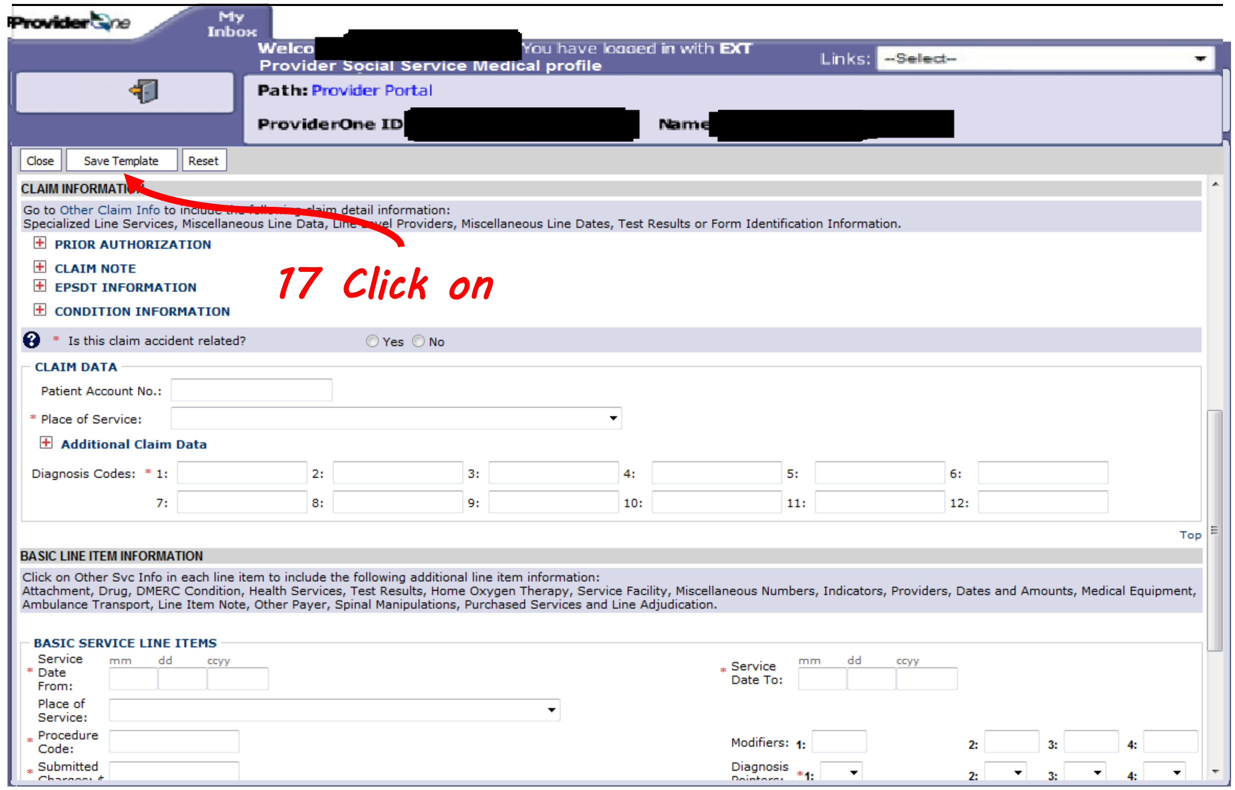
Create Template

Professional Claim (Template)

17. Click on Save Template

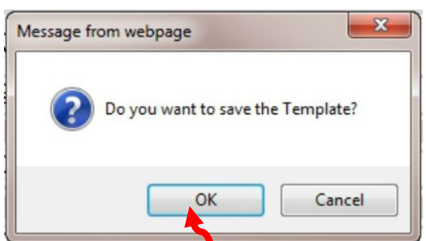
18. Pop-up appears

19. Click on OK



17 Click on

18



19 Click on

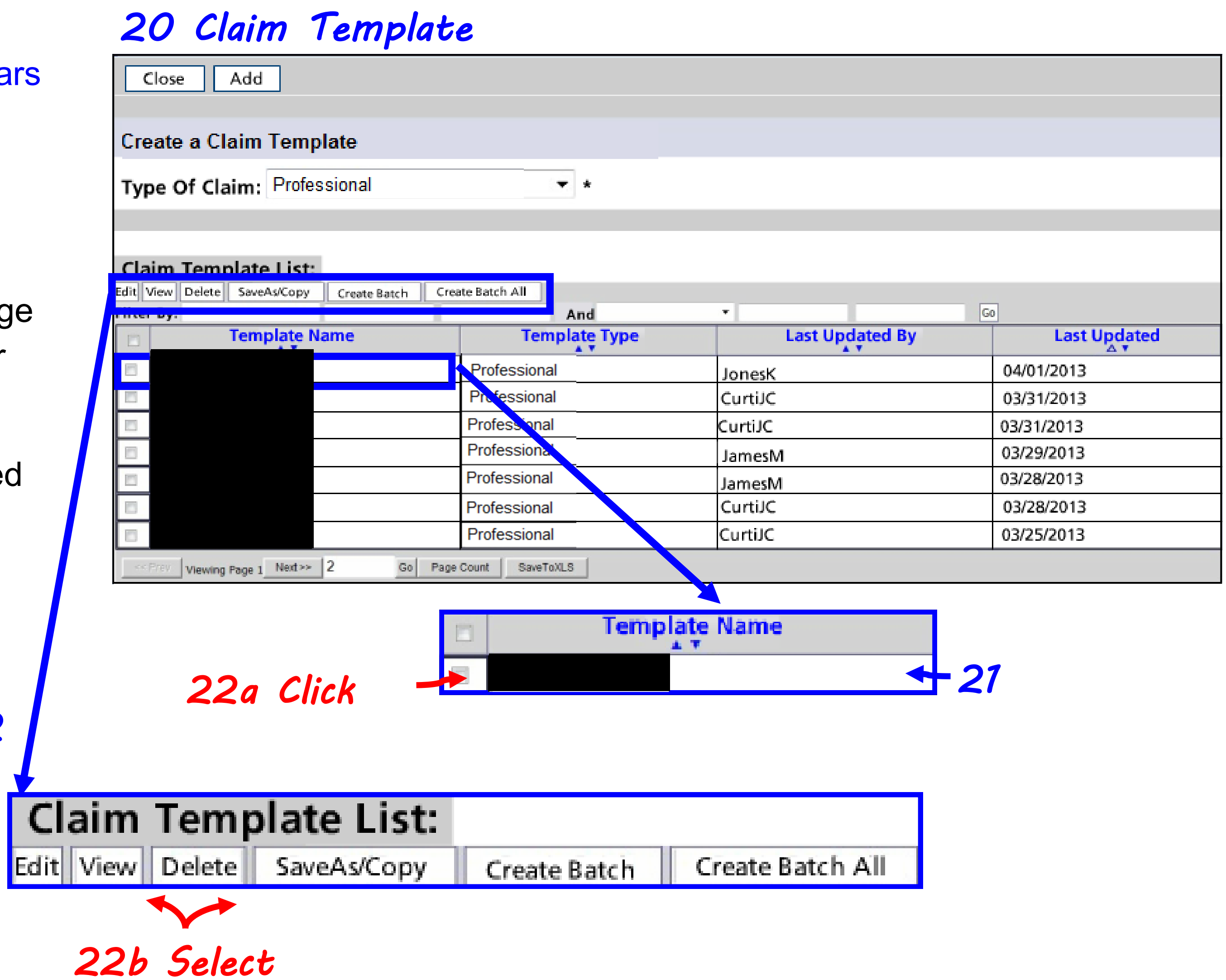
Please note: These instructions are for creating a template with the minimum number of entries needed to save the template. Most provider will want to add as much information as possible to the template to reduce the amount of data entry at billing. If you plan to use the Batch (Template) billing method, the template must be a complete bill, including a service line.

20. Claim Template page appears

21. Showing New template

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

- **a.** Click on ☐ next to desired template name
- **b.** Select action

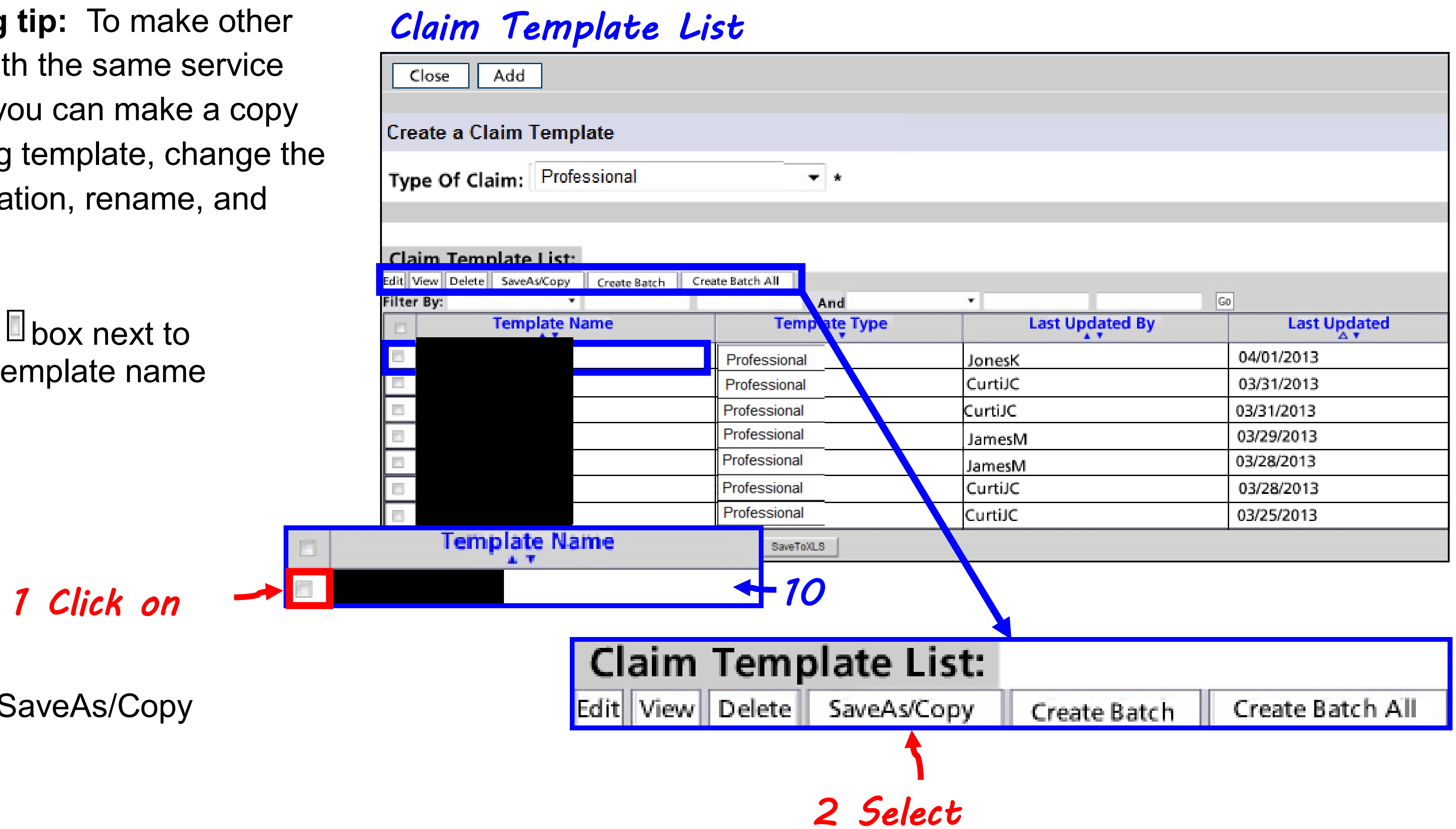


Copy Template

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.

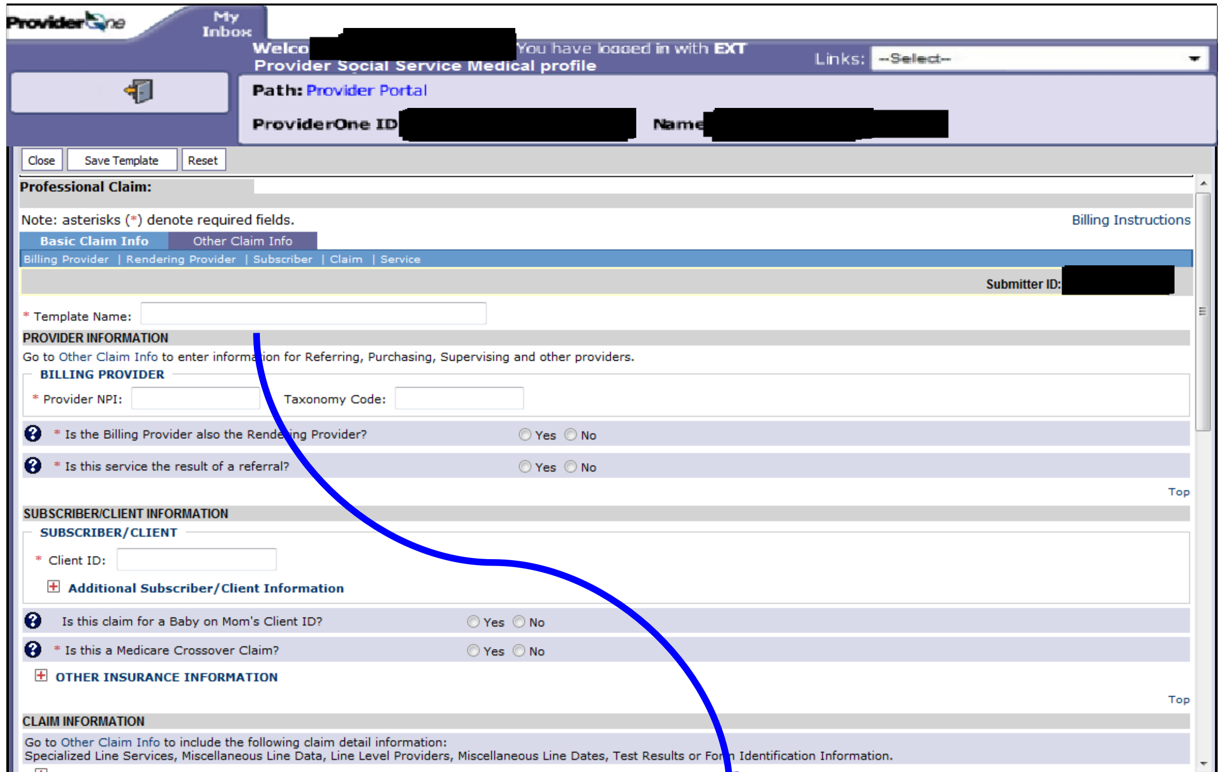
1. Click on ☐ box next to desired template name

2. Click on SaveAs/Copy



1. Template appears
2. Change Template Name

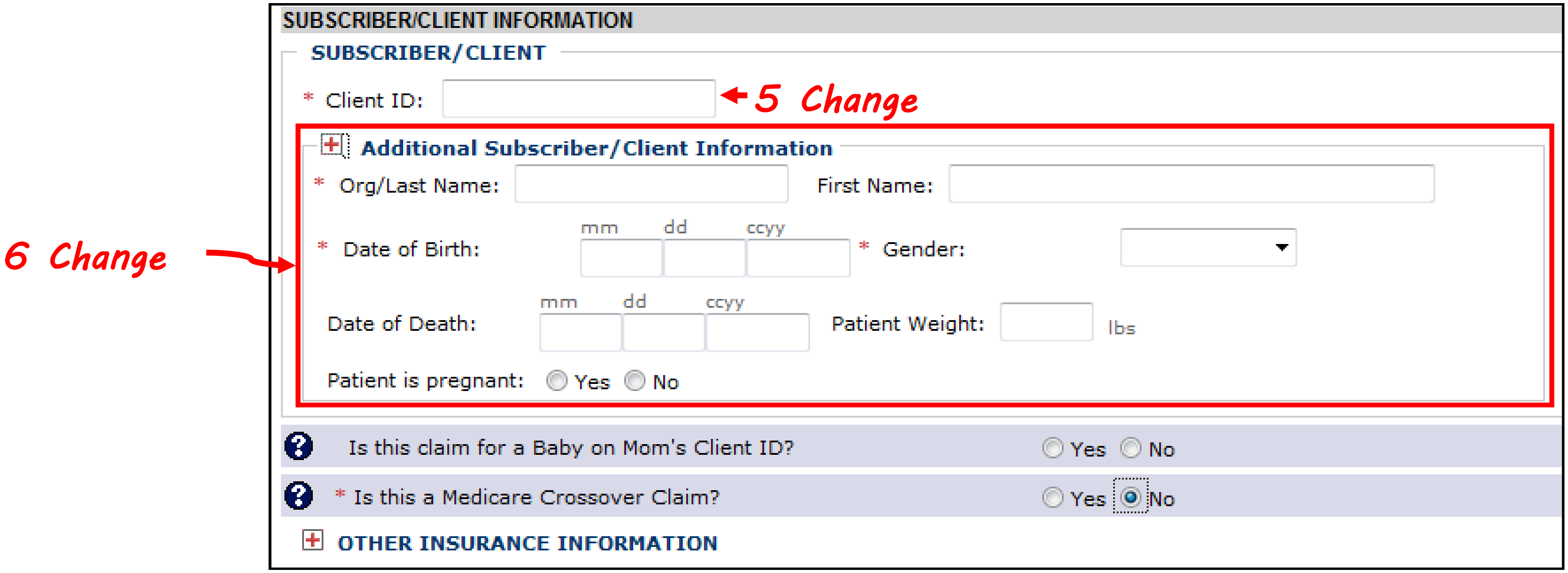
3 Professional Claim (Template)



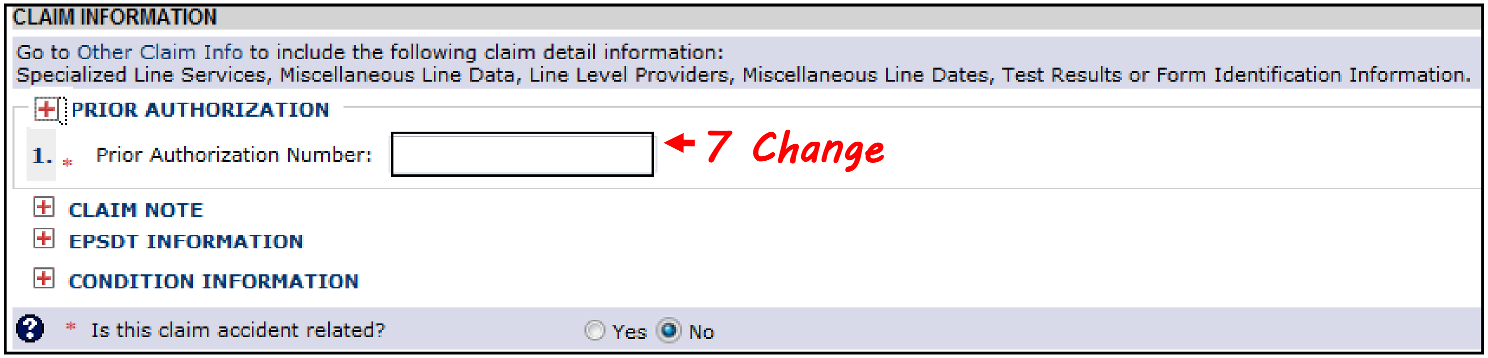
4 Change

5. Change Client ID

6. Change Client Information

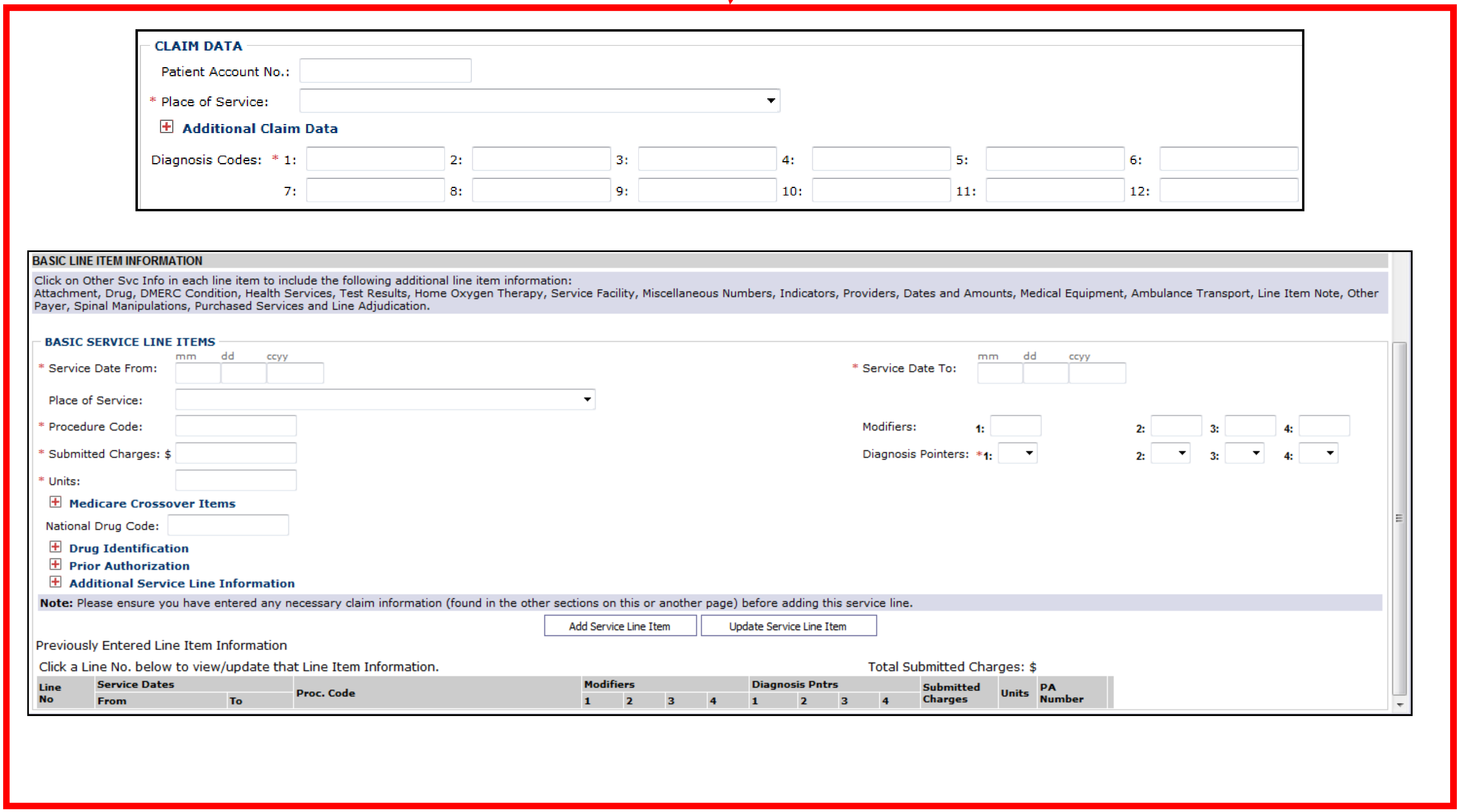


7. Change Authorization Number



9. Change information as needed

9 Change as needed


CLAIM DATA

Patient Account No.:

* Place of Service:

Additional Claim Data

Diagnosis Codes: * 1: 2: 3: 4: 5: 6:

7: 8: 9: 10: 11: 12:

BASIC LINE ITEM INFORMATION

Click on Other Svc Info in each line item to include the following additional line item information:
Attachment, Drug, DMERC Condition, Health Services, Test Results, Home Oxygen Therapy, Service Facility, Miscellaneous Numbers, Indicators, Providers, Dates and Amounts, Medical Equipment, Ambulance Transport, Line Item Note, Other Payer, Spinal Manipulations, Purchased Services and Line Adjudication.

BASIC SERVICE LINE ITEMS

* Service Date From: mm dd ccyy

* Service Date To: mm dd ccyy

Place of Service:

* Procedure Code:

Modifiers: 1: 2: 3: 4:

* Submitted Charges: $

Diagnosis Pointers: *1: 2: 3: 4:

* Units:

Medicare Crossover Items

National Drug Code:

Drug Identification

Prior Authorization

Additional Service Line Information

Note: Please ensure you have entered any necessary claim information (found in the other sections on this or another page) before adding this service line.

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 Submitted Charges: $

Line No	Service Dates From	To	Proc. Code	Modifiers 1	2	3	4	Diagnosis Pntrs 1	2	3	4	Submitted Charges	Units	PA Number

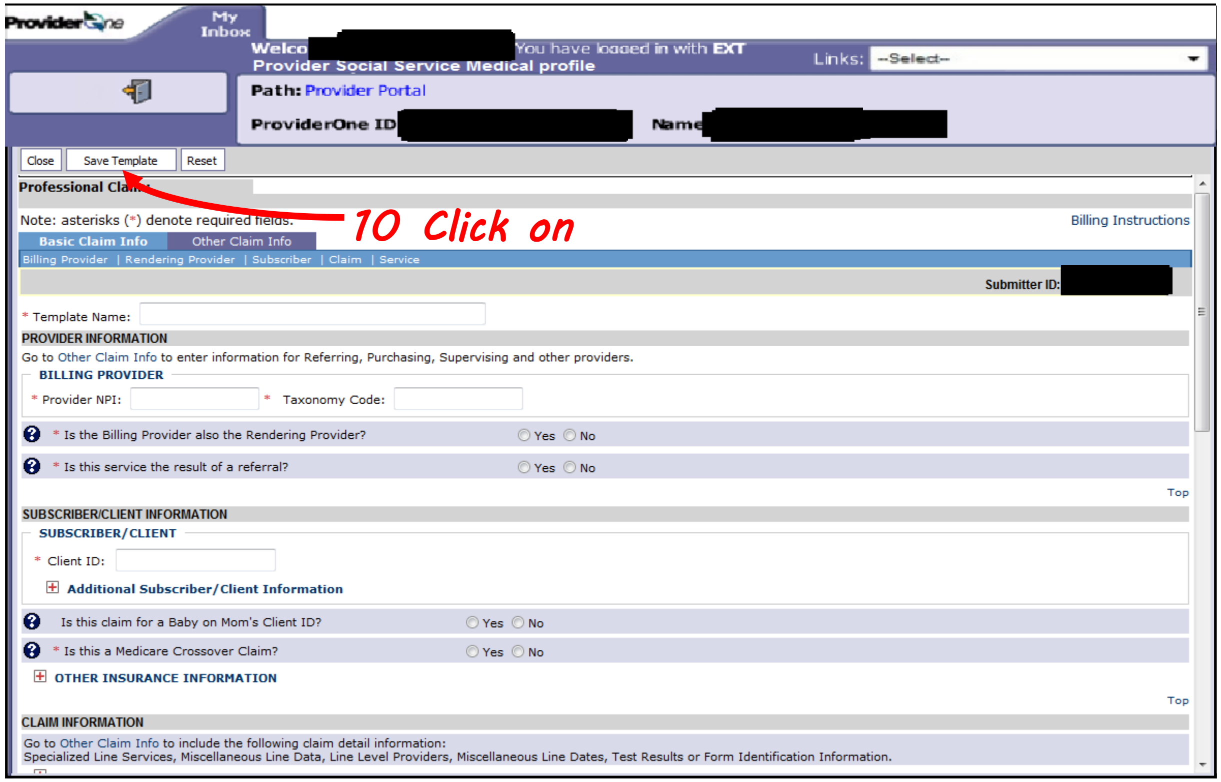
Copy Template

10. Click on Save Template

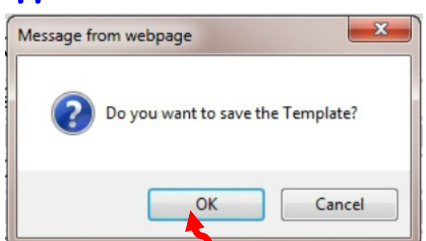
11. Pop-up appears

12. Click on OK

Professional Claim (Template)



11



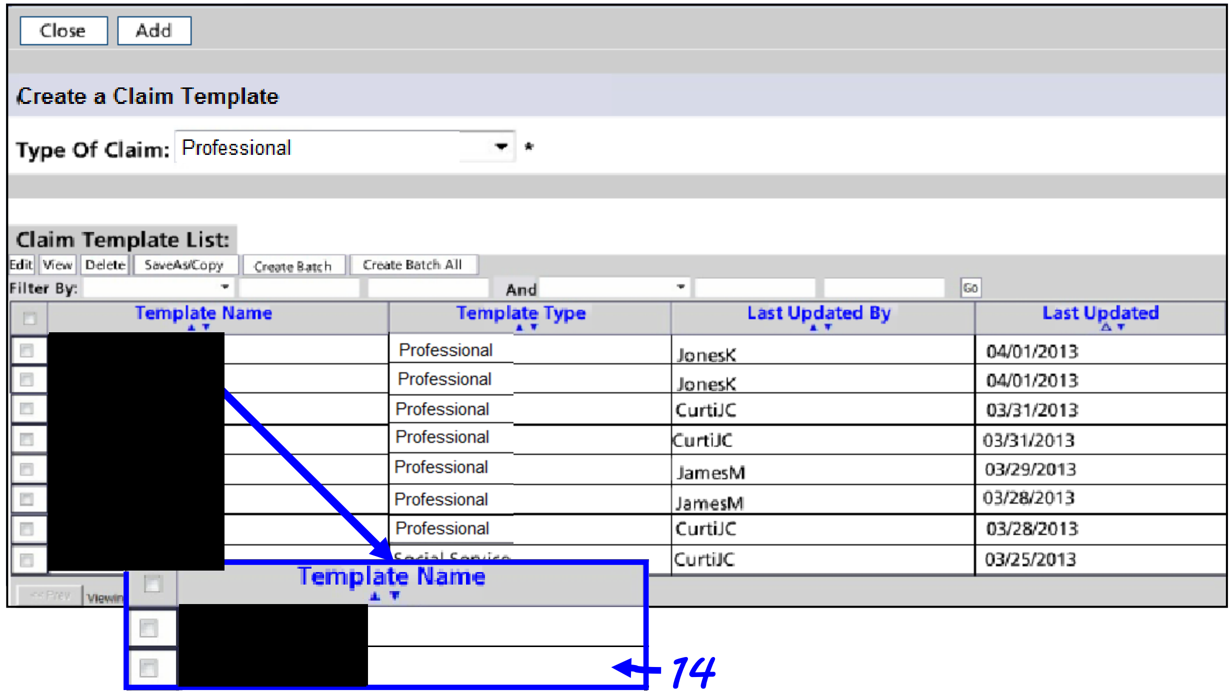
12 Click on

Copy Template

13. Claim Template List appears

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

13 Claim Template List



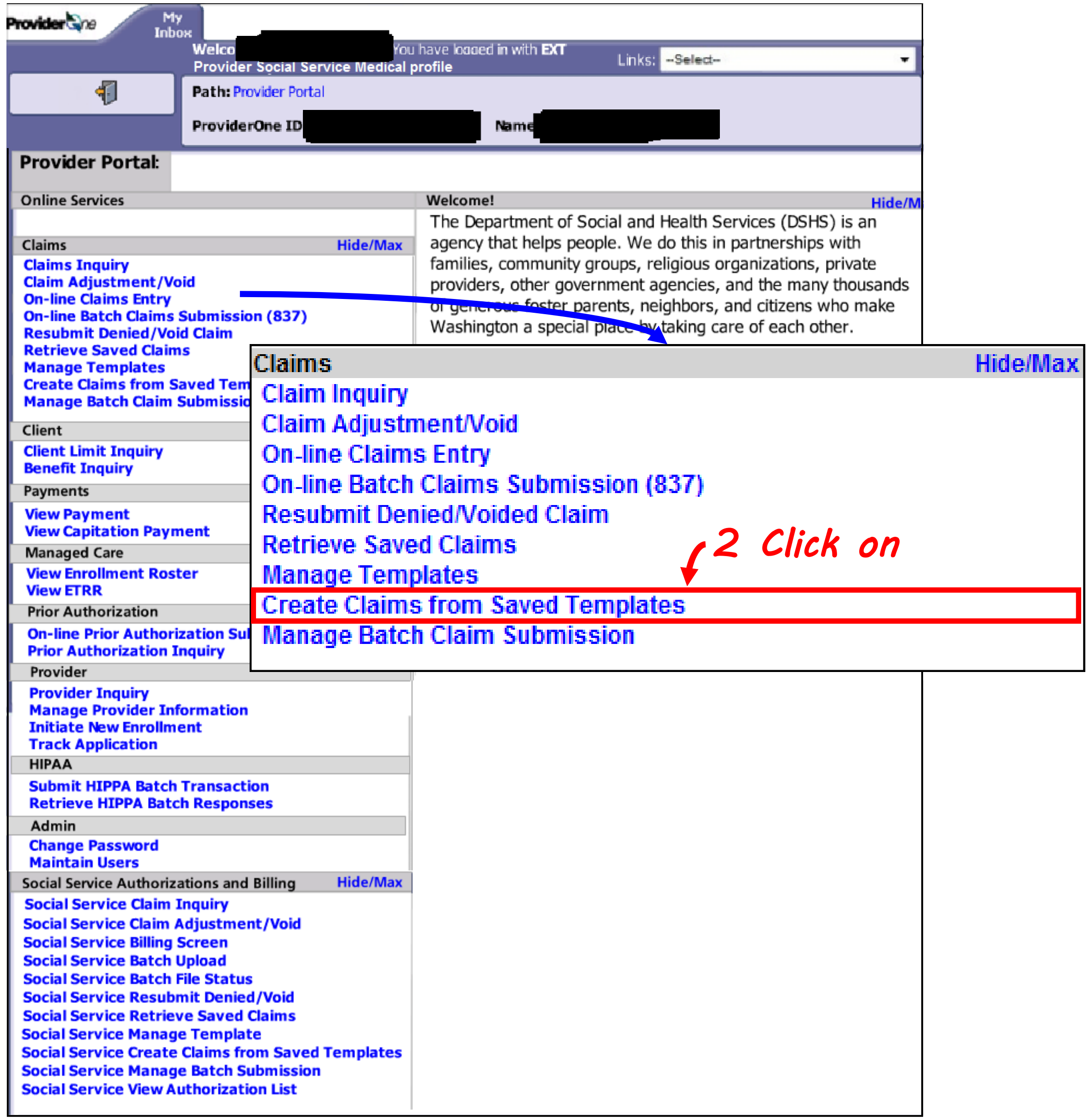
Submit Saved Template

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

1. From the Provider Portal

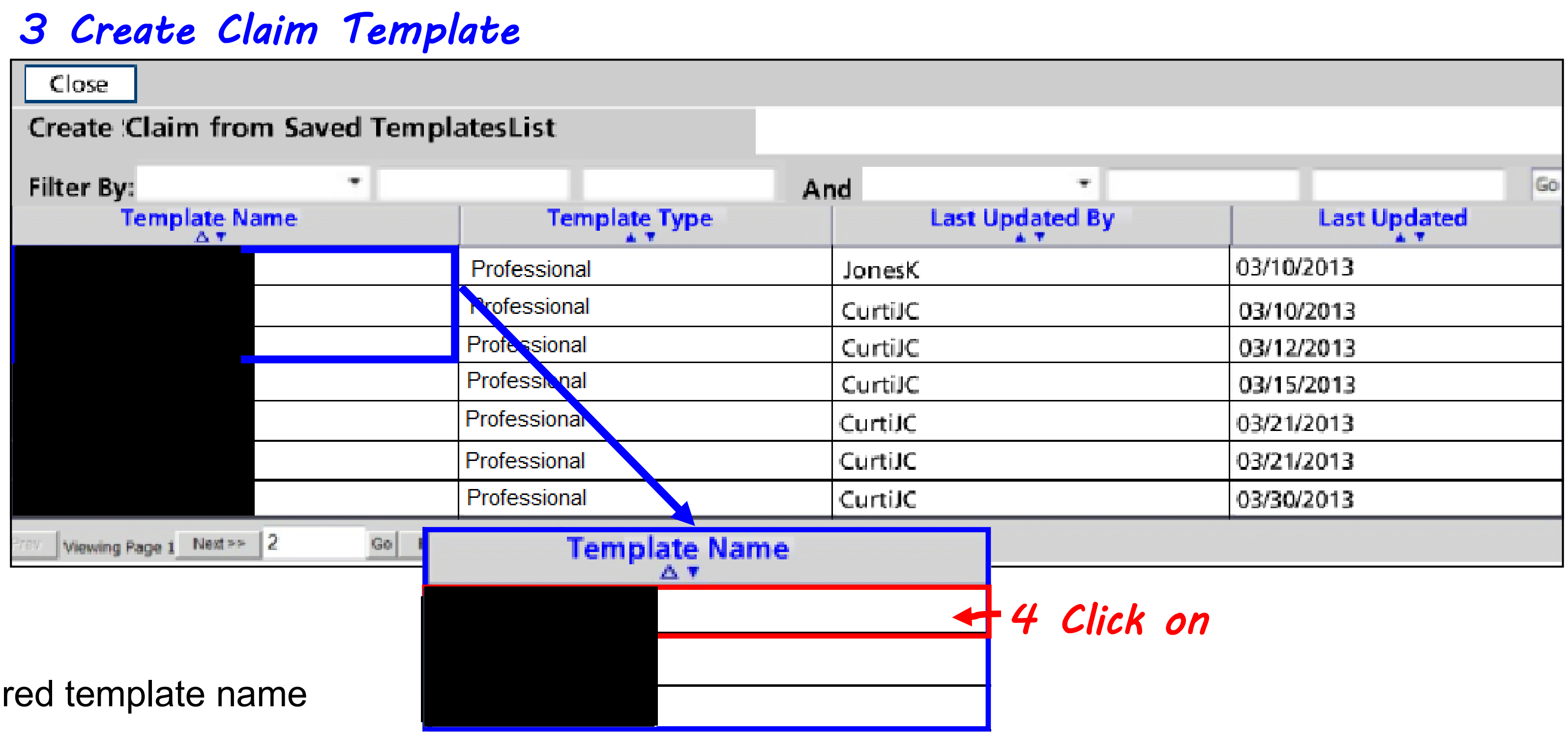
2. Click on Create Claims from Saved Templates

1 Provider Portal



Submit Saved Template

3. Create Social Service Claim from Saved Templates page appears



4. Click on desired template name

Submit Saved Template

5. The Billing Screen appears with template data

6. To submit a claim, use the same process as Submit Professional Claim

   a. Verify template data

   b. Change data as needed including adding the service line. As with billing, you can add multiple service lines

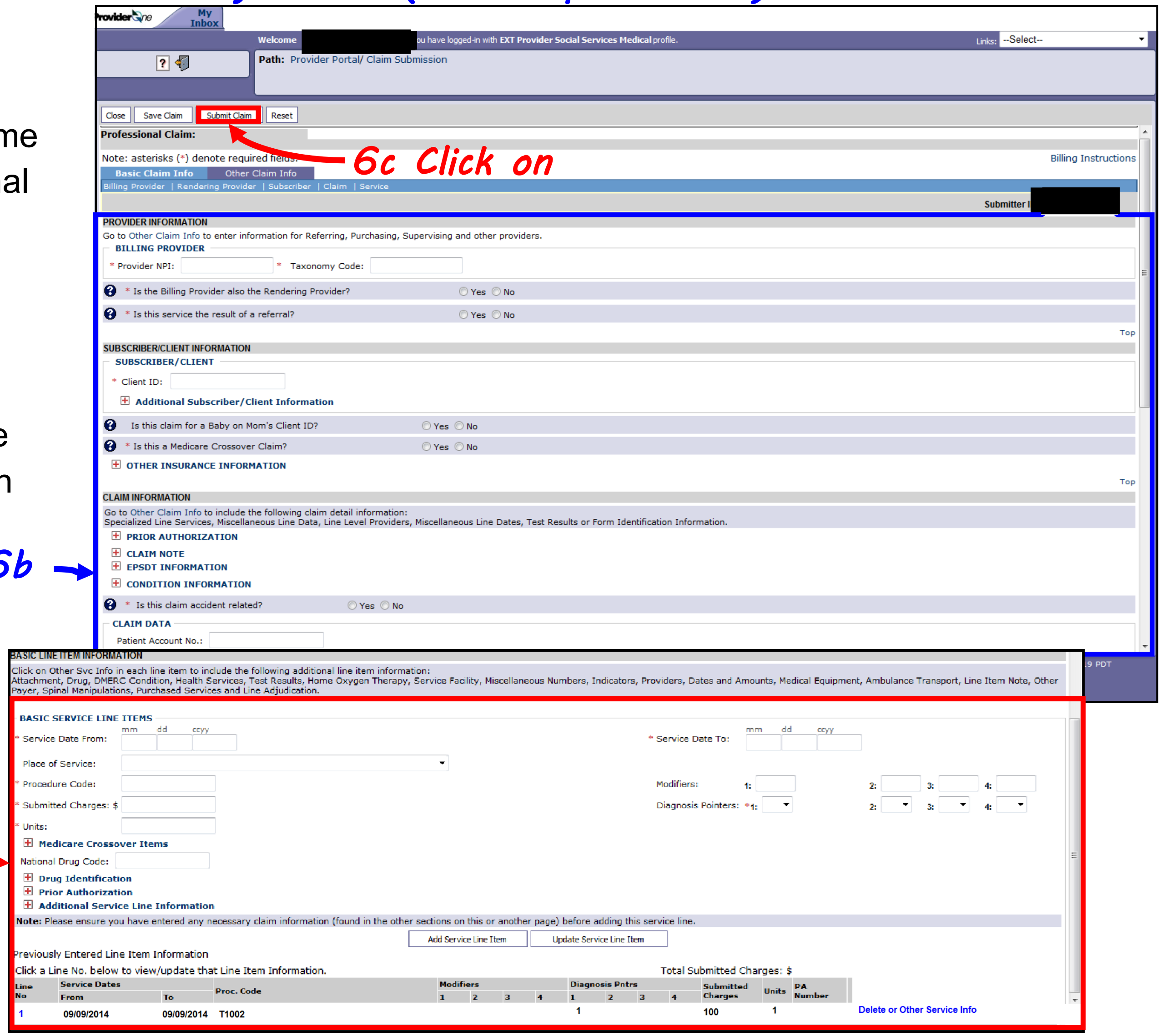
   c. Click on Submit Claim

5 Billing Screen (w/ template data)

6c Click on

6b

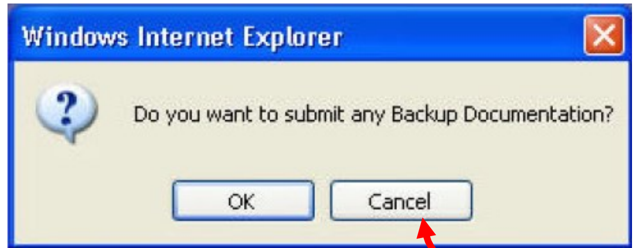
6b



7. Backup Document Pop-up appears

8. Click on Cancel (Social Service Medical claims do not require documentation.)

7 Backup Document Pop-up



8 Click on

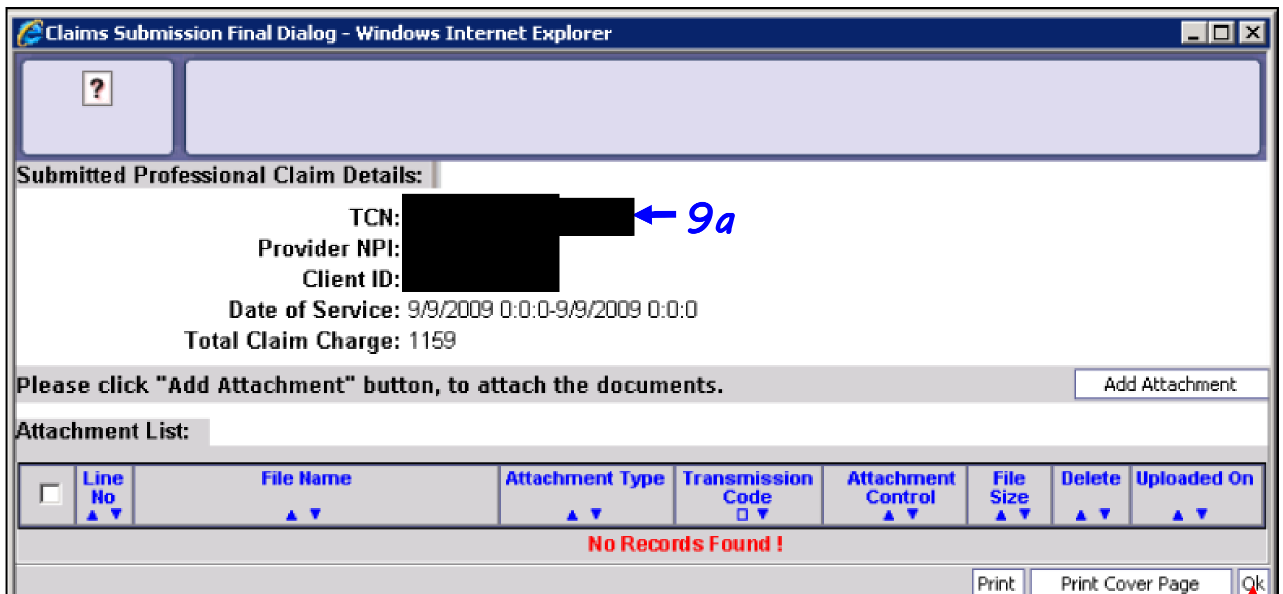
9. Submitted Professional Claim Details appears

   a. Transaction Control Number (TCN) is used for tracking the claim

   b. Click on Ok

> *You **must click on OK** to transmit the claim to ProviderOne.*

9 Submitted Professional Claim Details



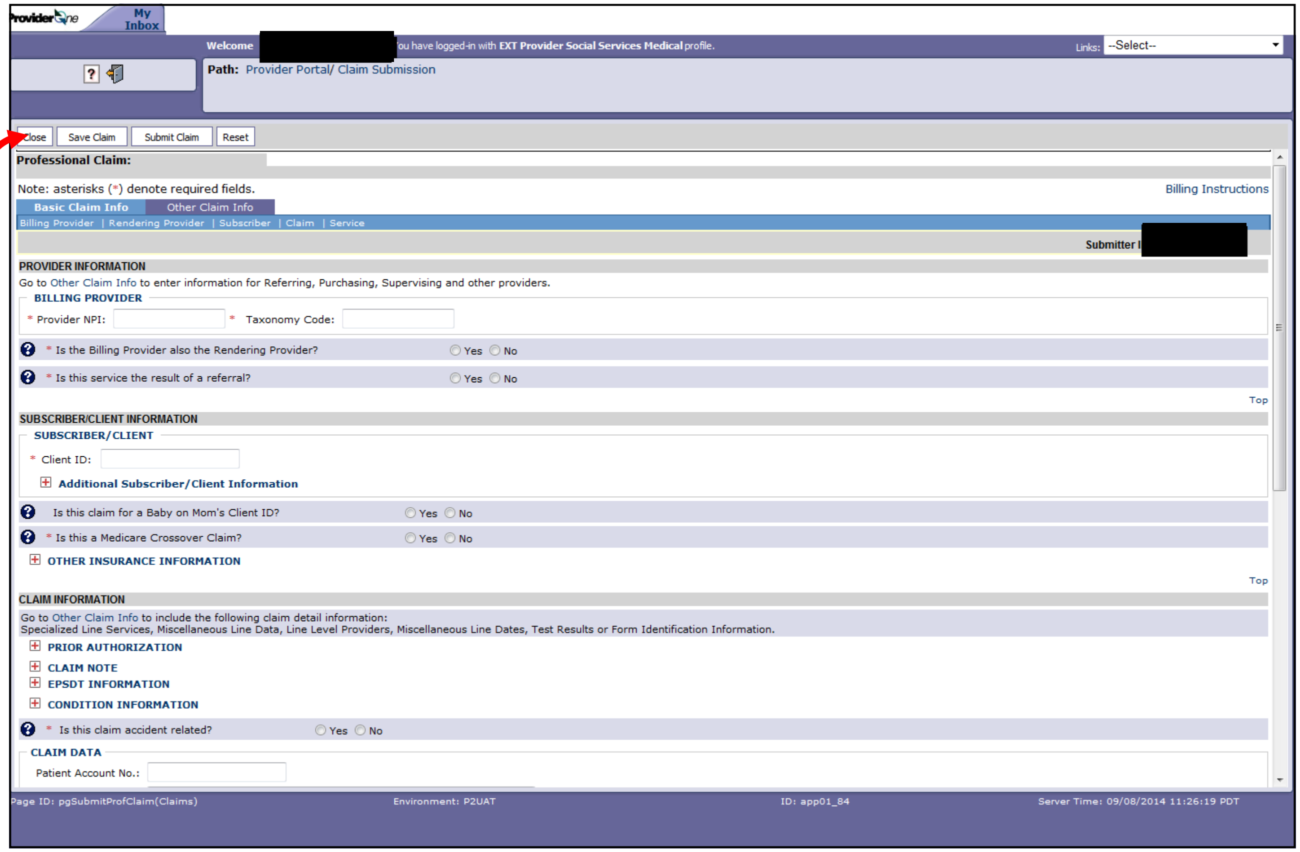
9b Click on

10. Blank Billing Screen appears

11. Click on Close

10 Billing Screen (w/ template data)

11 Click on



Submit Saved Template

12. Create Claim from Save Template appears

13. Select an new template

or

14. Click on Close to return to Portal Page.

12 Create Claim from Saved Template

14 Click on

13 Select

Close

Create Claim from Saved TemplatesList

Filter By: And Go

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

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