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

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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
This section is on how to create a template batch.

1. From the Provider Portal

2. Click on Social Service Manage Template
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 not showing, use the drop down menu to select Social Service

A Batch is a group of templates submitted at the same time which share the same date of service.
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
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.
10. Click on Save Template

11. Click on Close
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

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

16. Pop-up appears

17. Click on OK
18. Batch Claim Attributes appears

19. Claim Type defaults to Social Service

20. Enter Service From Date

21. Enter Service To Date

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
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.
### 25 Create Claim Template

<table>
<thead>
<tr>
<th>Close</th>
<th>Add</th>
</tr>
</thead>
</table>

**Type Of Claim:** Social Service

<table>
<thead>
<tr>
<th>Claim Template List:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add, Delete, Search, Create Batch, Create Batch All, Filter By:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Filter By</th>
<th>And</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Name</td>
<td>Template Type</td>
<td>Last Updated By</td>
</tr>
<tr>
<td>Social Service</td>
<td>JonesC</td>
<td>05/04/2013</td>
</tr>
<tr>
<td>Social Service</td>
<td>CurtIC</td>
<td>03/21/2013</td>
</tr>
<tr>
<td>Social Service</td>
<td>JonesM</td>
<td>03/28/2013</td>
</tr>
<tr>
<td>Social Service</td>
<td>CurtIC</td>
<td>03/28/2013</td>
</tr>
</tbody>
</table>

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### 26 Click on

26. You can repeat the process and create additional batches

or

Click on Close to return to the Provider Portal
This section is on how to submit a template batch.

1. From the Provider Portal

2. Click on Social Service Manage Batch Submission
3. From the **Batch Claim Submission Status List**

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

5. **Click on** View Claims

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

9. Basic Billing Screen

The System Generated Claim ID is the batch number and saved claim number.
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
11. Modified service line appears

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

20. **Click on** Close
21. Batch Claim Submission Status List appears

24. Click on

22. Showing updated status

23. Showing Submitted Claim Count

24. Click on Close
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
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
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

15b Enter SA420

15a Click on

15d Click on Update Service Line Item
16. Corrected service line appears

17. Click on Save Template

18. Pop-up appears

19. Click on OK

20. Click on Close
21. The View Template List from Batch appears

22. Click on Revalidate

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