The “Create & Submit Batch (Template)” How To provides instructions on:

- Create Batch ............ 2
- Submit Batch .......... 12
- Revalidate Batch ..... 19

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 batch of templates.

1. From the **Provider Portal**

2. **Click on** Manage Template

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**1 Provider Portal**

**Claims**
- Claims Inquiry
- Claim Adjustment/Void
- On-line Claims Entry
- On-line Batch Claims Submission (837)
- Resubmit Denied/Void Claim
- Retrieve Saved Claims
- Manage Templates
- Create Claims from Saved Templates
- Manage Batch Claim Submission
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 **Professional**. If is not showing, use the drop down menu to select Professional

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
7. The saved template appears

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

9. Change the template as needed

Submitted Charge and number of units must be for this billing period.
10. Click on Save Template

11. Click on Close
12. The Claim Template List 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

   15a Click on

   b. Click on Create Batch

16. Pop-up appears

16 Pop-up

17. Click on OK

17 Click on
18. Batch Claim Attributes appears

19. Select Professional Claim Type

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: (Few medical service codes are daily or monthly unit types)
  * 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. The Claim Template List 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 Manage Batch Claim Submission

The Department of Social and Health Services (DSHS) is an agency that helps people. We do this in partnerships with families, community groups, religious organizations, private providers, other government agencies, and the many thousands of generous foster parents, neighbors, and citizens who make Washington a special place by taking care of each other.
3. From the **Batch Claim Submission Status List**

4. Click on the box next to the desired batch. A batch must have status of **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

8a Click on

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

8b-d Professional Claim (Template)
9. You can delete a claim prior to submission of the batch. Click on box next to the desired batch.

10. Click on Delete.
You can submit all or some of the listed claims.

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

12. Click on Submit Selected

or

11 Click on

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

A batch can only be used one time.
14. After submitting the batch, the System Generated Claim ID is replaced with the Transaction Control Number (TCN)

15. Click on Close
16. Batch Claim Submission Status List appears

19. Click on

17. Showing updated status

18. Showing Submitted Claim Count

19. 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 Manage Batch Claim 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 all the templates have complete, valid information and the batch can be submitted.

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

6. To view why a batch failed validation, click on the batch number.
7. The View Template List from Batch appears

8. Click on status

9. Template Validation Errors appears

10. View Error Description (IE “service code is invalid/empty”)

11. Click on Close
12. The View Template List from Batch appears

13. Click on template name

14. Template appears

15. Find and correct the error then save the template

16. Click on Save
17. The View Template List from Batch appears

18. Click on Revalidate

19. The Batch Claim Submission Status List appears

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

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