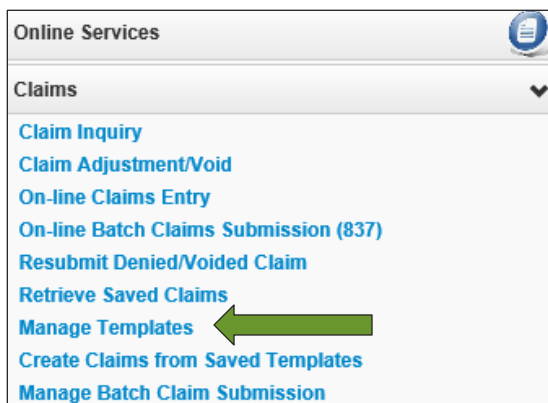


# Creating templates and submitting a template claim

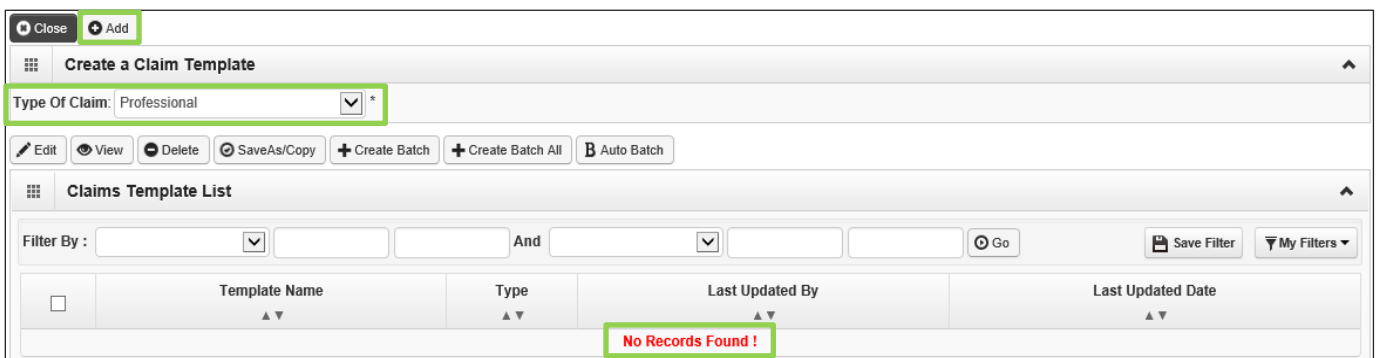
The ProviderOne system allows a provider to create and save Direct Data Entry (DDE) claim templates for all three claim types (institutional, dental, and professional). Templates are pre-designed claims that can be customized for a particular service or item supplied monthly to a client, to bill a special service code, or to create template batches for Nursing Home clients. Templates can be used for claim entry with standard information already completed, or be used over and over so that each claim does not have to be created from scratch. There is no limit to the number of templates that can be created. You can submit single claims or batches of claims from saved claim templates. For more information on using templates for nursing home claims, access the [Nursing home provider webinar](#).

## Create a template:

1. Log into ProviderOne using the Claims Submitter or Super User profile and choose **Manage Templates**:



2. At the **Create a Claim Template** screen, pick the **Type of Claim** using the dropdown option (dental, institutional, professional) and click the **Add** button. If there are no templates created for your domain, you will see **No Records Found!** in red.



3. ProviderOne loads the DDE screen of the template type selected. Enter a **Template Name** and answer **all questions marked with a question mark and a red asterisk**. This is the minimum data required to save a template.

The screenshot shows the 'Professional Claim' DDE screen. At the top, there are buttons for 'Close', 'Save Template', and 'Reset'. Below the title, a note states: 'Note: asterisks (\*) denote required fields.' There are two tabs: 'Basic Claim Info' (selected) and 'Other Claim Info'. A breadcrumb trail at the bottom reads: 'Billing Provider | Rendering Provider | Subscriber | Claim | Service'. The 'Template Name' field is highlighted with a green border.

Dental:

The screenshot shows the 'Dental' DDE screen with two required questions, each marked with a question mark and a red asterisk:

- \* Is the Billing Provider also the Rendering Provider?  Yes  No
- \* Is this claim accident related?  Yes  No

Institutional:

The screenshot shows the 'Institutional' DDE screen with one required question, marked with a question mark and a red asterisk:

- \* Is this a Medicare Crossover Claim?  Yes  No

Professional:

The screenshot shows the 'Professional' DDE screen with five required questions, each marked with a question mark and a red asterisk:

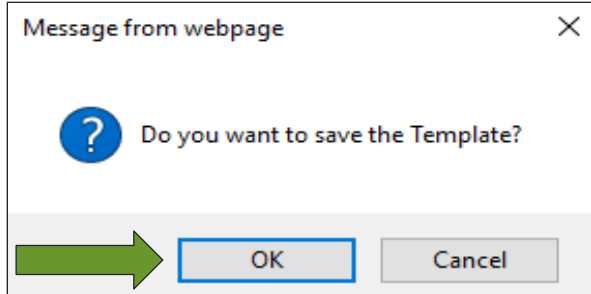
- \* Is the Billing Provider also the Rendering Provider?  Yes  No
- \* Is this service the result of a referral?  Yes  No
- Is this claim for a Baby on Mom's Client ID?  Yes  No
- \* Is this a Medicare Crossover Claim?  Yes  No
- \* Is this claim accident related?  Yes  No

4. Providers can add as much or as little information necessary, as long as the template name and all required questions are answered. Once the template is complete, click on the **Save Template** button.

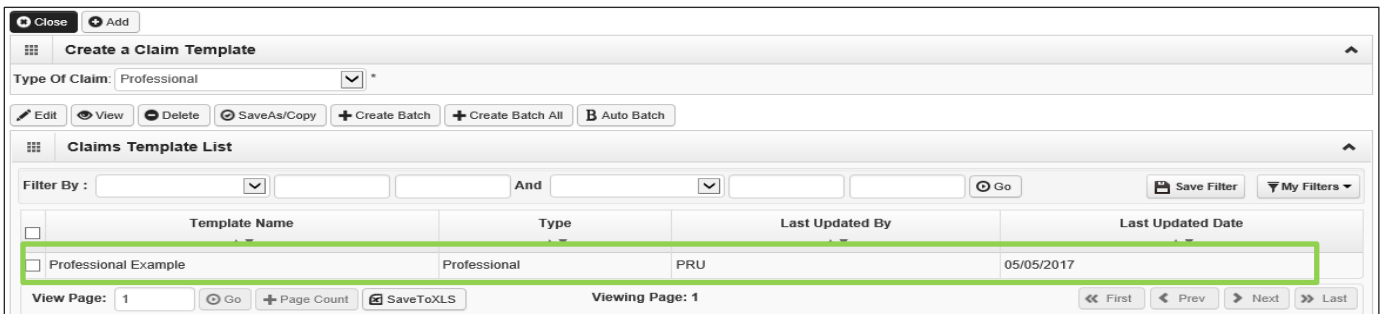
This screenshot is identical to the one above, but with a green arrow pointing to the 'Save Template' button at the top left of the form.



5. A pop-up window will appear with a question. Click the **OK** button to save the template:

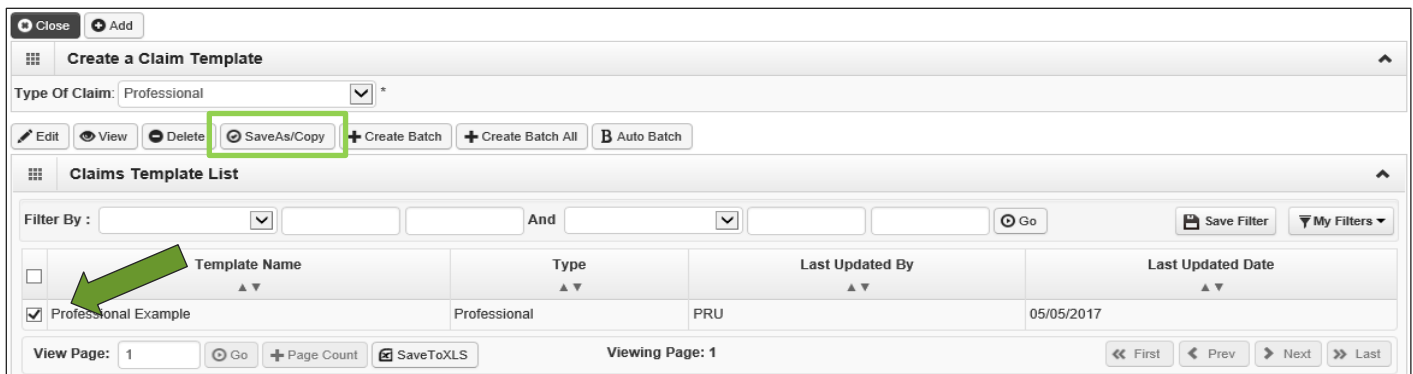


6. ProviderOne returns to the **Create a Claim Template** screen adding the new template to the list. You can add as many templates as needed by using the above method, or by copying an existing template and editing.



### Copy a template:

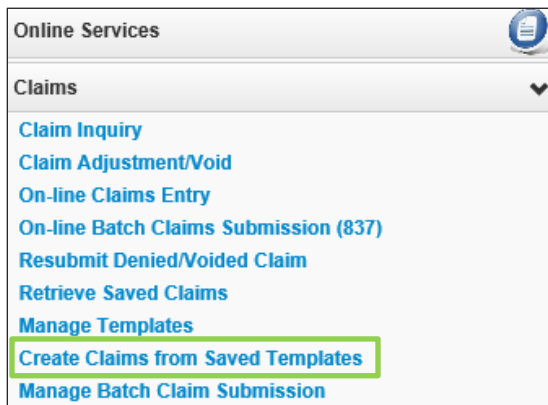
1. To copy a template, click on the box next to the template name to select it.
2. Click on the **Save As/Copy** button.



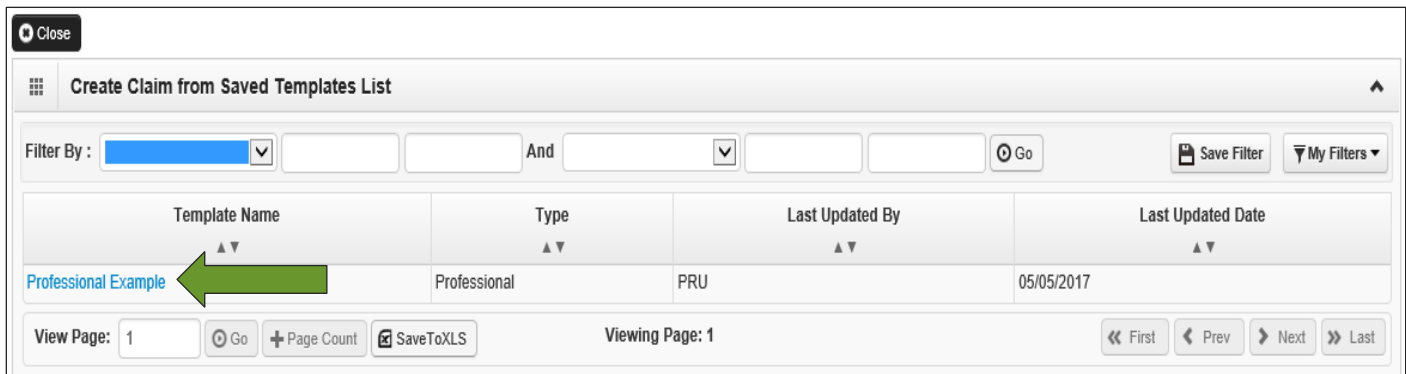
3. ProviderOne will display the DDE screen with the template information except the template name. Name this template and change any data as needed and click **Save**. Build as many templates as required using this method. You can use this same procedure to **Edit** and make changes to a saved template or **Delete** a template from the list.

## Submit a claim using a template:

1. Log into ProviderOne using the Claims Submitter profile or Super User profile and choose **Create Claims from Saved Templates**:



2. On the Create Claim from Saved Templates List, click on the template name to create a claim:



3. ProviderOne loads the saved template data in the DDE claim screen:

Close Save Claim Submit Claim Reset

**Professional Claim**

Note: asterisks (\*) denote required fields. [Billing Instructions](#)

**Basic Claim Info** Other Claim Info

Billing Provider | Rendering Provider | Subscriber | Claim | Service

Submitter ID: 200320900

**PROVIDER INFORMATION**

Go to [Other Claim Info](#) to enter information for Referring, Purchasing, Supervising and other providers.

**BILLING PROVIDER**

\* Provider NPI: 1801051784 \* Taxonomy Code: 207Q00000X

? \* Is the Billing Provider also the Rendering Provider?  Yes  No

? \* Is this service the result of a referral?  Yes  No

**SUBSCRIBER/CLIENT INFORMATION**

**SUBSCRIBER/CLIENT**

\* Client ID:

4. Finish filling in all claim data. Once completed, you can click **Save Claim** for submission at a future time or **Submit Claim** for immediate submission.

Close Save Claim Submit Claim Reset

**Professional Claim**

5. When you click on the **Submit Claim** button, ProviderOne shows the following dialogue message box:

Message from webpage

? Do you want to submit any Backup Documentation?

OK Cancel

6. Click on **OK** to submit backup documentation or **Cancel** if no backup is being submitted with the claim.



7. ProviderOne will bring up the **Submitted Claim Detail** screen. To completely finalize the claim, click the **Submit** button.

**Submitted Professional Claim Details:**

TCN: 201712500206853000  
Provider NPI: 1801051784  
Client ID: 99999998WA  
Date of Service: 01/01/2017-01/01/2017  
Total Claim Charge: \$ 100.00

Please click "Add Attachment" button, to attach the documents. Add Attachment

**Attachment List**

Line No	File Name	Attachment Type	Transmission Code	Attachment Control #	File Size	Delete	Uploaded On
No Records Found !							

Print Submit

## References:

See the [ProviderOne resources webpage](#) for links to recorded webinars and other training tools.

## Questions:

**What are templates?** Templates are pre-designed electronic claims that a provider can customize by entering standard information for a particular service, client, or group of clients. The template can then be used as a starting point for claim entry with the standard information already filled in. There is no limit to the number of templates providers can create.

**Why would I use templates?** If you regularly bill similar services for similar clients, it may benefit you to use templates so that some of the standard information you would have to enter on every claim is already completed for you.

**How do I access the template/submit batch features?** In the provider portal, the features are accessed through these menus:

- **Manage Templates** – use this option to create, edit, and manage templates.
- **Create Claims from Saved Templates** – use this option to start a new claim from a saved template.
- **Manage Batch Claim Submission** – use this option to submit a batch of claims created from saved templates. Using a combination of date ranges and checkboxes, the saved templates selected by a provider will be batched together and submitted as claims for processing in ProviderOne.
- **Institutional batch claims process** – makes it easier to submit batches of institutional claim types, based on admit and discharge dates. This feature is designed especially for nursing homes but may be useful for other institutional providers. (**Note:** this enhancement is only available for institutional claims. It will not be possible to use admit/discharge dates on professional and dental claims.)

