# 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**:
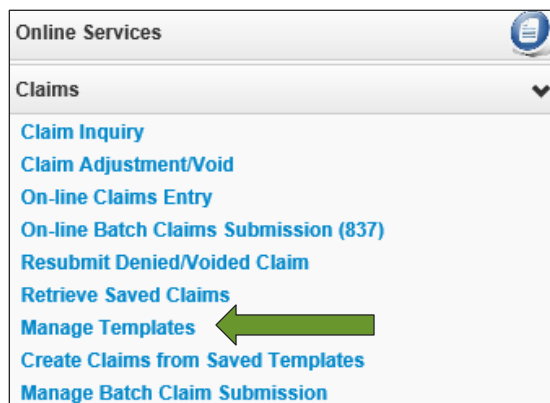
2. At the **Create a Claim Template** screen, pick the **Type of Claim** using the dropdown option (dental, institutional, professional) and click the **Add** button. If there are no templates created for your domain, you will see No Records Found! in red.
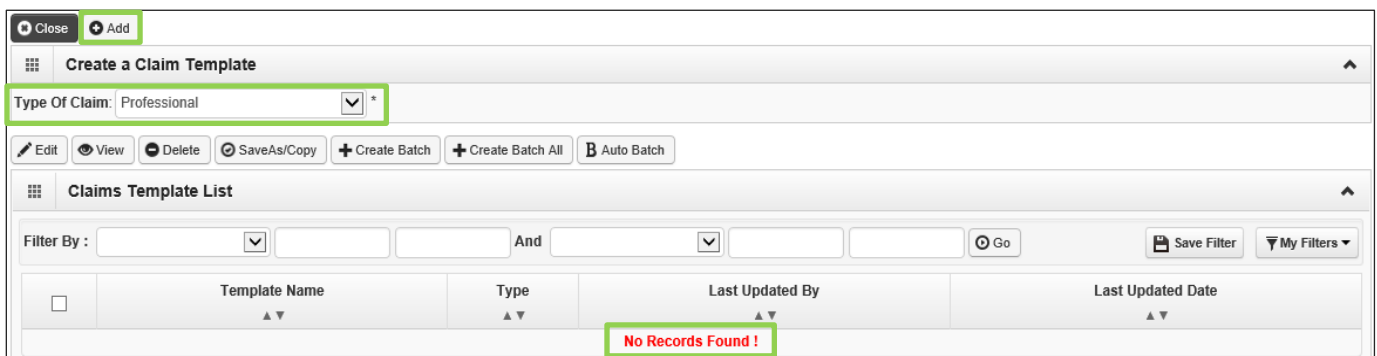
3. ProviderOne loads the DDE screen of the template type selected. Enter a **Template Name** and answer **all questions marked with a question mark and a red asterisk**. This is the minimum data required to save a template.
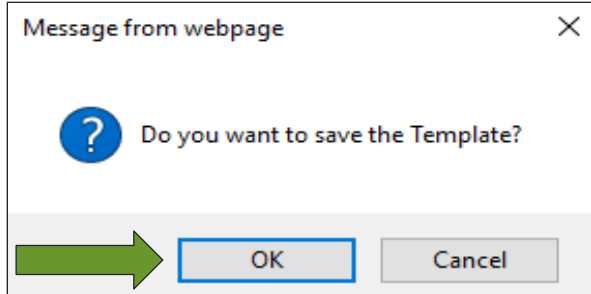

Dental:

Institutional:

Professional:

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.

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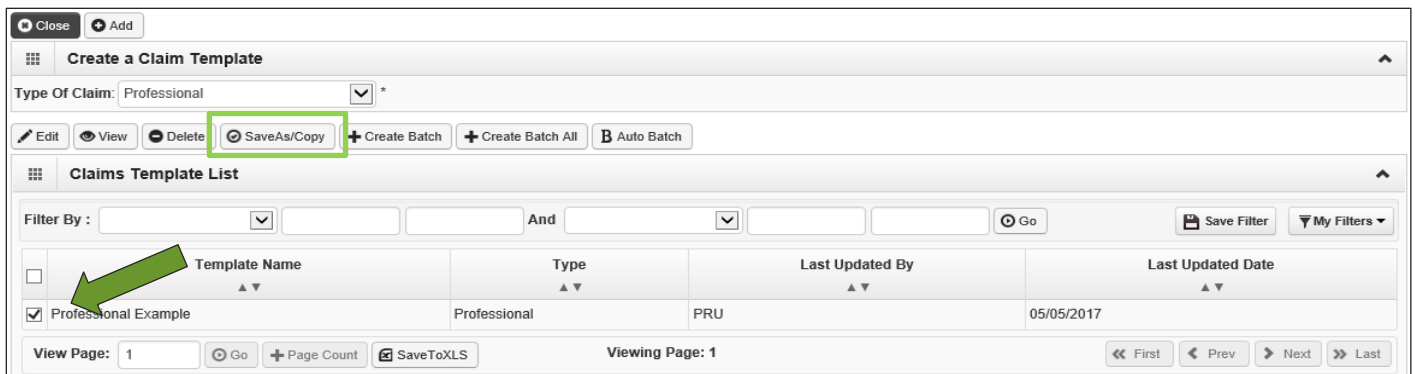

6. ProviderOne returns to the **Create a Claim Template** screen adding the new template to the list. You can add as many templates as needed by using the above method, or by copying an existing template and editing.
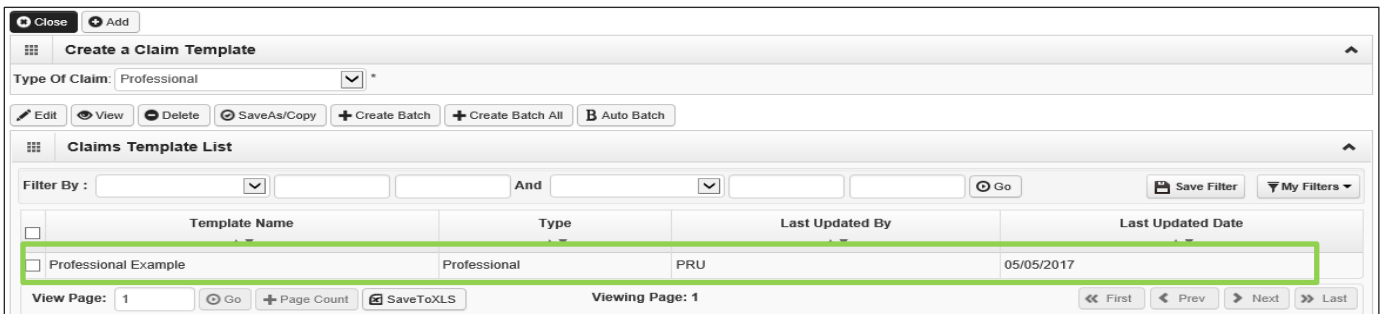

Copy a template:

1. To copy a template, click on the box next to the template name to select it.

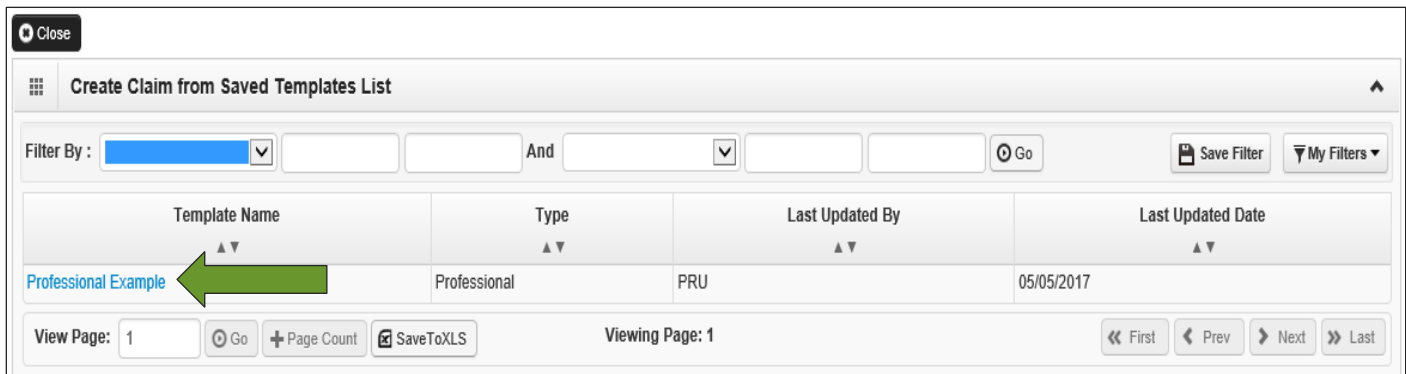2. Click on the **Save As/Copy** button.

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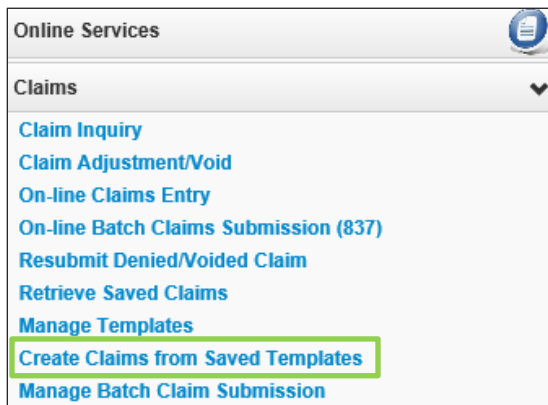
2. On the Create Claim from Saved Templates List, click on the template name to create a claim:

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

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.

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

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.

References:

See the Learn ProviderOne 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.)