

SimpleClaim™

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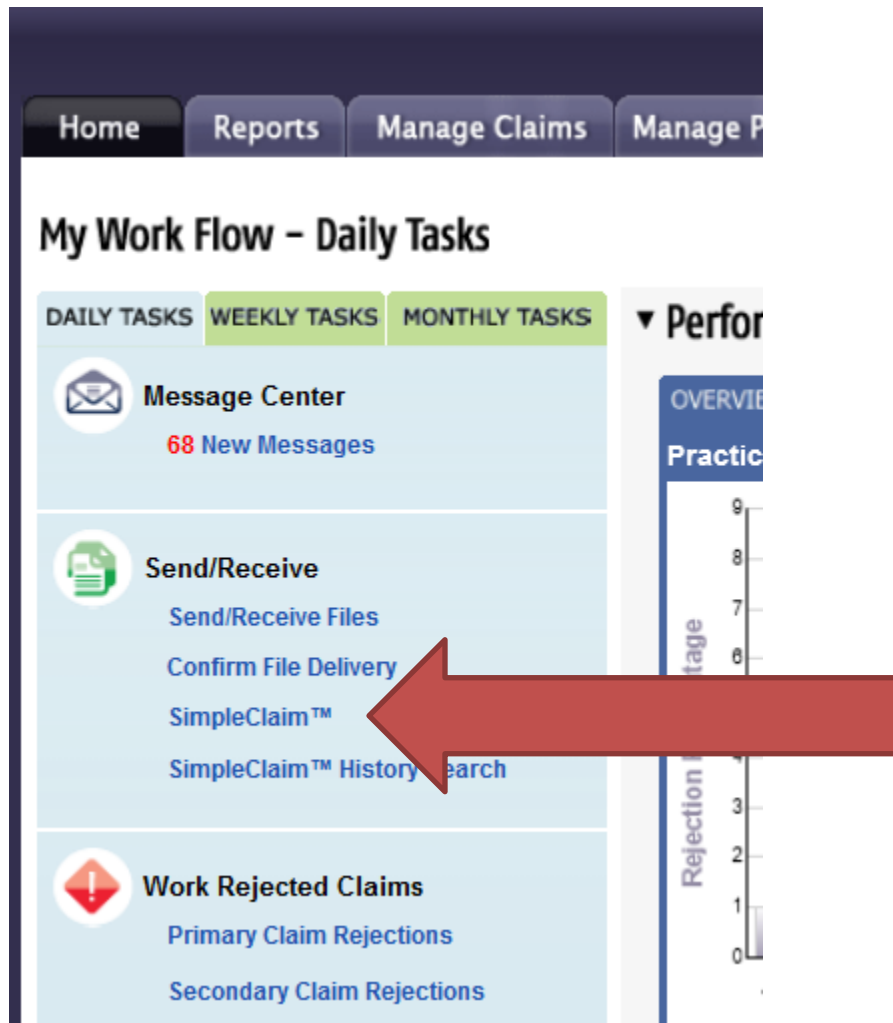
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Product Overview

TriZetto Provider Solutions' SimpleClaim™ product provides an integrated Direct Data Entry solution for providers that do not have a Practice Management System for claims submission. It offers the capabilities to create and save patient profiles, creates both professional and institutional claims, and offers a claim archive to edit and resubmit previously processed claims. The solution is only available for primary claims.

Accessing SimpleClaim

SimpleClaim can be accessed on the home page, under the *Send/Receive* section. This will open an additional tab in your web browser.



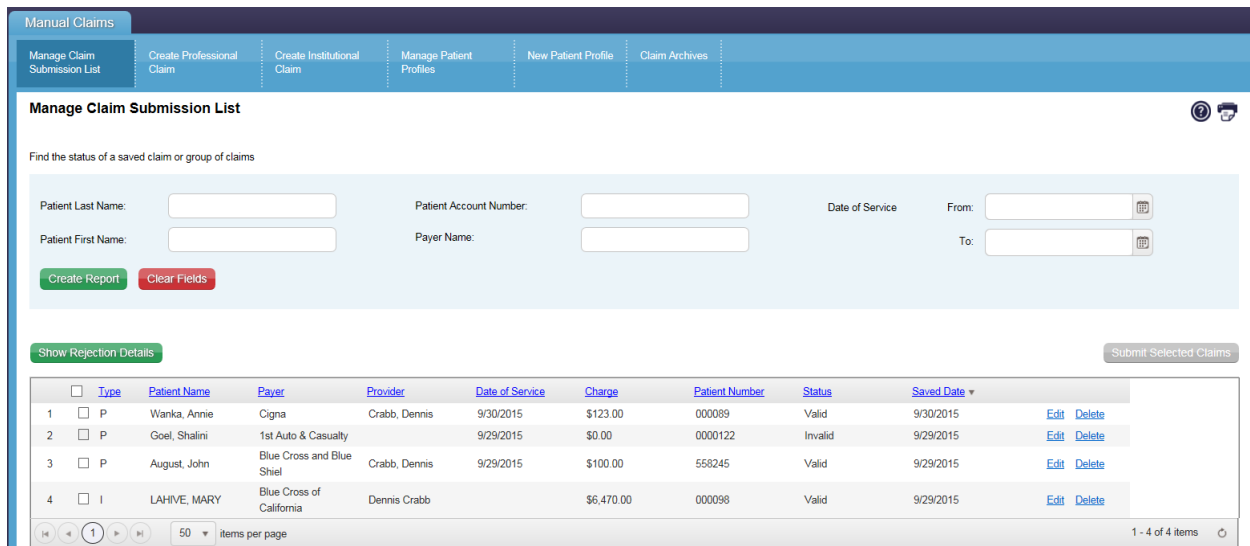
SimpleClaim History Search

The *SimpleClaim History Search* is a quick link to search all of your submitted claims. You may use the *Search By* drop down list to choose the best search criteria to fit your needs.

Please note that if you utilize the SimpleClaim product as well as a Practice Management Software to submit claims, you may use the Advanced Search to filter these from each other. Once this option is selected, use the filter on the right hand side for *SimpleClaim™*.

Manage Claims Submission List

The *Manage Claims Submission List* will show a list of claims that have been created, but not yet submitted to the payer for processing. Claims can be edited, deleted, or submitted from here.

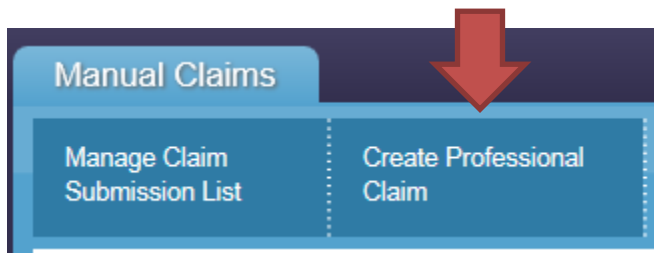


The screenshot shows the 'Manual Claims' section with a sub-tab 'Manage Claim Submission List'. It includes search filters for Patient Last Name, Patient First Name, Patient Account Number, Payer Name, Date of Service (From/To), and buttons for 'Create Report' and 'Clear Fields'. Below the filters is a table of claims with columns for Type, Patient Name, Payer, Provider, Date of Service, Charge, Patient Number, Status, and Saved Date. The table contains 4 rows of data. At the bottom, there are pagination controls showing '50 items per page' and '1 - 4 of 4 items'.

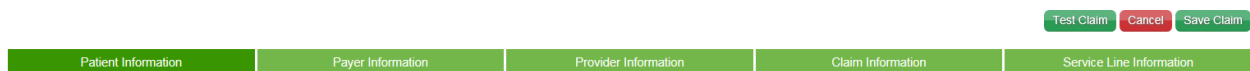
<input type="checkbox"/>	Type	Patient Name	Payer	Provider	Date of Service	Charge	Patient Number	Status	Saved Date	
<input type="checkbox"/>	P	Wanka, Annie	Cigna	Crabb, Dennis	9/30/2015	\$123.00	000089	Valid	9/30/2015	Edit Delete
<input type="checkbox"/>	P	Goel, Shalini	1st Auto & Casualty		9/29/2015	\$0.00	0000122	Invalid	9/29/2015	Edit Delete
<input type="checkbox"/>	P	August, John	Blue Cross and Blue Shiel	Crabb, Dennis	9/29/2015	\$100.00	558245	Valid	9/29/2015	Edit Delete
<input type="checkbox"/>	I	LAHIVE, MARY	Blue Cross of California	Dennis Crabb		\$6,470.00	000098	Valid	9/29/2015	Edit Delete

Create Professional Claim

To create a professional claim, select this option at the top:



The product is broken into 5 sections for data entry: *Patient Information, Payer Information, Provider Information, Claim Information, and Service Line Information.*



The navigation bar consists of five green buttons: 'Patient Information', 'Payer Information', 'Provider Information', 'Claim Information', and 'Service Line Information'. Above these buttons are three smaller buttons: 'Test Claim' (green), 'Cancel' (red), and 'Save Claim' (green).

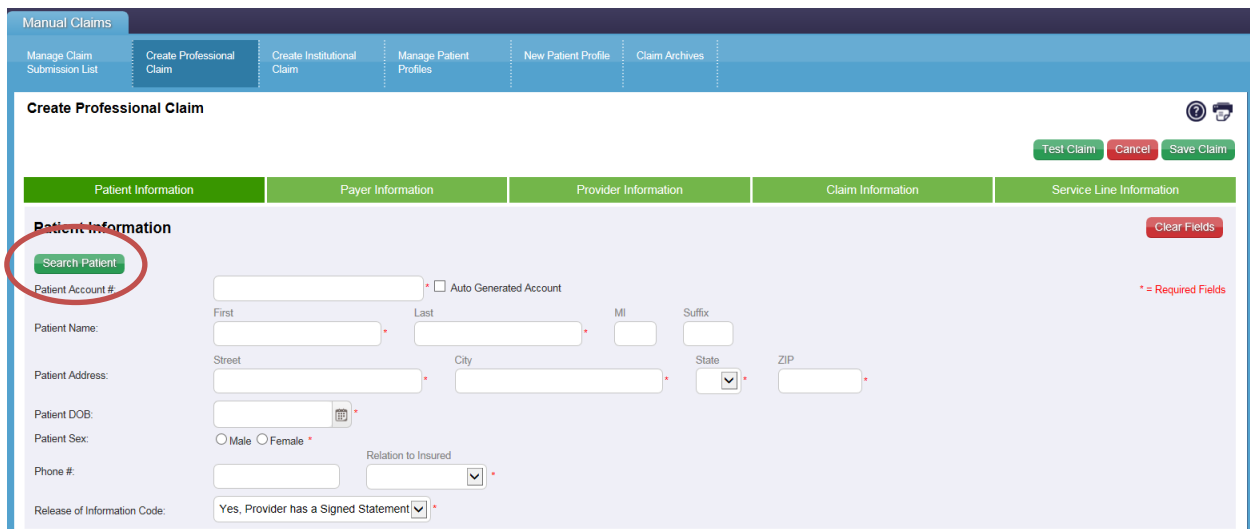
A few key features under each of these tabs are included below:

Patient Information

Patient Account #: The user may select the *Auto Generate Account* box to have a patient account number automatically assigned, otherwise they may enter their own in the free text box. The account number that is submitted on the claim will also update in the patient profile.

Search Patient: This will allow the user to select a patient with an existing profile (see more on creating patient profiles on page 19). If a patient is selected, all information from the patient profile will automatically populate in the corresponding fields.

Please note that once a claim is submitted and if the *Search Patient* feature wasn't used, the system will automatically check if there is an existing patient profile with that account number already. If there is not, it will save the patient as a new patient profile. To eliminate the chance of creating multiple patient profiles for the same patient, we recommend using the Search Patient option when a patient profile already exists.



The screenshot shows the 'Create Professional Claim' interface. At the top, there are navigation tabs: 'Manual Claims', 'Manage Claim Submission List', 'Create Professional Claim', 'Create Institutional Claim', 'Manage Patient Profiles', 'New Patient Profile', and 'Claim Archives'. The 'Create Professional Claim' tab is selected. Below the tabs, there are buttons for 'Test Claim', 'Cancel', and 'Save Claim'. The main form is divided into five sections: 'Patient Information', 'Payer Information', 'Provider Information', 'Claim Information', and 'Service Line Information'. The 'Patient Information' section is expanded and contains the following fields:

- Search Patient:** A button circled in red, used to find existing patient profiles.
- Patient Account #:** A text input field with an 'Auto Generated Account' checkbox.
- Patient Name:** Fields for First, Last, MI, and Suffix.
- Patient Address:** Fields for Street, City, State (dropdown), and ZIP.
- Patient DOB:** A date input field with a calendar icon.
- Patient Sex:** Radio buttons for Male and Female.
- Phone #:** A text input field and a 'Relation to Insured' dropdown menu.
- Release of Information Code:** A dropdown menu with the option 'Yes, Provider has a Signed Statement' selected.

A red asterisk (*) indicates required fields. A 'Clear Fields' button is located in the top right corner of the Patient Information section.

Patient

	Patient Account Number	First Name	Last Name	Date Of Birth
Select	000098	MARY	LAHIVE	3/7/1967
Select	558245	John	August	1/15/1990
Select	000089	Annie	Wanka	10/15/1982
Select	0000146	MARY	LAHIVE	1/1/2001
Select	0000149	JIM	TEST	2/5/1989

10 items per page 1 - 5 of 5 items

Payer Information

Search Primary Payer: This will pull the full list of payers and will state if it's professional or institutional. You can search by payer ID, payer name, or claim type, and the payer ID/name field allows for free text. Once you identify the needed payer, simply choose *select*. You will be able to search for the Horizon NJ Health Payer ID here. It is 22326. **Please note that claims sent to any other payers besides Horizon NJ Health will not be processed.**

Payer

	Payer ID	Claim Type	Payer Name
Select	R6845	Professional	1-888-OHIOCOMP
Select	13162	Professional	1199 Local Benefit Fund
Select	J1585	Professional	1st Auto & Casualty
Select	29076	Professional	1st Medical Network
Select	59069	Professional	21st Century Health & Benefits
Select	41556	Professional	21st Century Insurance
Select	51028	Professional	21st Century Insurance Services (Minnesota Only)
Select	41556	Professional	22125 Roscoe Corp.
Select	07205	Professional	360 Alliance - Gilsbar

Provider Information

Search Billing Provider: This will pull up a list of all providers that we have on file for the client's account.

Provider Information

▼ Billing Provider

Search Billing Provider

Provider Name Organization Name

Search Provider

	Tax Id	First Name	Last Name	Billing NPI	Address
Select	421141851	Kathy	Berens-Brownmiller		115 N 14th StreetDenisonIA51442-
Select	421141851	Dennis	Crabb	1003899147	115 N 14th StreetDenisonIA51442-
Select	456489131	Martin	Bedowski		305 South Woodsmill RoadSuite 201St. LouisMO63126
Select	142235565	Tracy	Orthram		305 South Woodsmill RoadSuite 201St. LouisMO63126
Select	431892787	Eligibility	Univ of MO		305 South Woodsmill RoadSuite 201St. LouisMO63126
Select	431892787	Michael	Duffy		305 South Woodsmill RoadSuite 201St. LouisMO63126

Pay To Provider:

Provider Information

► Billing Provider

▼ Pay To Provider

Address 1:

Address 2:

City:

State:

ZIP:

► Rendering Provider

► Referring Provider

► Service Facility

Search Rending Provider: This will pull up a list of all rendering providers that we have on file for the client's account.

Provider Information

- ▶ Billing Provider
- ▶ Pay To Provider
- ▼ Rendering Provider

Search Rendering Provider

Provider Name Organization Name

	Tax Id	First Name	Last Name	Rendering NPI	Address
Select	421141851	Kathy	Berens-Brownmiller		115 N 14th Street DenisonIA51442-
Select	421141851	Dennis	Crabb	1003899147	115 N 14th Street DenisonIA51442-
Select	456489131	Martin	Bedowski		305 South Woodsmill Road Suite 201St. LouisMO63126
Select	142235565	Tracy	Orthram		305 South Woodsmill Road Suite 201St. LouisMO63126
Select	431892787	Eligibility	Univ of MO		305 South Woodsmill Road Suite 201St. LouisMO63126
Select	431892787	Michael	Duffy		305 South Woodsmill Road Suite 201St. LouisMO63126

Referring Provider:

Provider Information

- ▶ Billing Provider
- ▶ Pay To Provider
- ▶ Rendering Provider
- ▼ Referring Provider

Provider Name

Last Name:

First Name:

Middle Name:

Taxonomy Code:

Primary Identifier:

NPI

Secondary Identifier:

- ▶ Service Facility

Search Service Facility: This will pull up a list of all service facilities that we have on file for the client's account.

Provider Information

- ▶ Billing Provider
- ▶ Pay To Provider
- ▶ Rendering Provider
- ▶ Referring Provider
- ▼ Service Facility

Search Service Facility

	<u>Tax Id</u>	<u>First Name</u>	<u>Last Name</u>	<u>Billing NPI</u>	<u>Address</u>
Select	421141851	Kathy	Berens-Brownmiller		115 N 14th Street DenisonIA51442-
Select	421141851	Dennis	Crabb	1003899147	115 N 14th Street DenisonIA51442-
Select	456489131	Martin	Bedowski		305 South Woodsmill Road Suite 201St. LouisMO63126
Select	142235565	Tracy	Orthram		305 South Woodsmill Road Suite 201St. LouisMO63126
Select	431892787	Eligibility	Univ of MO		305 South Woodsmill Road Suite 201St. LouisMO63126
Select	431892787	Michael	Duffy		305 South Woodsmill Road Suite 201St. LouisMO63126

Claim Information

Patient Information	Payer Information	Provider Information	Claim Information	Service Line Information
Claim Information Clear Fields				
<small>* = Required Fields</small>				
Place of Service	<input type="text"/>			
Provider Signature on File	Yes			
Provider Accepts Assignment Code	Assigned			
Benefits Assignment Certification Indicator	Yes			
Parent Signature Executed on Patient's Behalf?	<input type="radio"/> Yes <input type="radio"/> No			
Related Causes Code1:	<input type="text"/>	State: <input type="text"/>		
Related Causes Code2:	<input type="text"/>			
Special Program Code:	<input type="text"/>			
EPSDT Referral	<input type="text"/>	<input type="text"/>		
Delay Reason Code:	<input type="text"/>			
Additional Dates	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Additional Reference Numbers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Prior Authorization Number:	<input type="text"/>			
Resubmission Code:	<input type="text"/>			
Note:	<input type="text"/>			
Attachments				
Type of Document:	<input type="text"/>			
How Attachment is Sent:	<input type="text"/>			

Service Line Information

ICD Version Indicator: This will allow you to search by either ICD-9 or ICD-10 codes. Once your selection is made in the drop down, choose the *View ICD Codes* box. You may search by either the code or description and the results will pull anything with the specified digits. Once you identify your needed code, select the diagnosis code box you would like it to appear in and then “*add code*” and it will populate in the chosen box.

Diagnosis Codes

ICD Version Indicator

1. * 3. 7. 9. 11.

2. 4. 6. 8. 10. 12.

ICD Codes x

Search by Code or Description Search

Code	Description	Add Code
H10011	Acute follicular conjunctivitis, right eye	Add Code
H10012	Acute follicular conjunctivitis, left eye	Add Code
H10013	Acute follicular conjunctivitis, bilateral	Add Code
H10019	Acute follicular conjunctivitis, unspecified eye	Add Code
H10021	Other mucopurulent conjunctivitis, right eye	Add Code

1 - 5 of 68 items ↻

Make sure you put your primary code into box #1

1 <input style="width: 40px;" type="text"/>	2 <input style="width: 40px;" type="text"/>	3 <input style="width: 40px;" type="text"/>	4 <input style="width: 40px;" type="text"/>	5 <input style="width: 40px;" type="text"/>	6 <input style="width: 40px;" type="text"/>
7 <input style="width: 40px;" type="text"/>	8 <input style="width: 40px;" type="text"/>	9 <input style="width: 40px;" type="text"/>	10 <input style="width: 40px;" type="text"/>	11 <input style="width: 40px;" type="text"/>	12 <input style="width: 40px;" type="text"/>

Add Service Line: This will add an additional service line to the top, pushing existing service lines down a line

Move Service Line: This will move a service line up by one service line

Delete Service Line: This will delete the indicated service line

Service Line 1

+ Add Service Line
 ← Move Service Line
 - Delete Service Line

Date of Service: From: To:

Place of Service:

CPT/HCPCS Code: Ⓜ *

Modifiers:

Diagnosis Pointer(s):

Line Charges: \$ Measurement: Units:

CPT/HCPCS Code Ⓜ: This will allow you to search by the code or description. Enter your data and the results will pull anything with the specified digits. Once you identify your needed code, select the diagnosis code box you would like it to appear in and then “add code” and it will be populated in the chosen box

Service Line 1

+ Add Service Line
 ← Move Service Line
 - Delete Service Line

Date of Service: From: To:

Place of Service:

CPT/HCPCS Code: Ⓜ *

Modifiers:

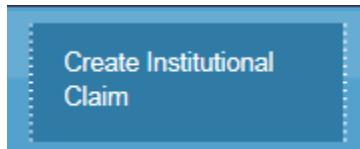
Diagnosis Pointer(s):

Line Charges: \$ Measurement: Units:

CPT/HCPCS Codes		
Search by Code or Description		<input type="button" value="Search"/>
Code	Description	
0001F	Heart failure composite	<input type="button" value="Add Code"/>
0001M	Infectious disease, HCV	<input type="button" value="Add Code"/>
0002M	Liver disease, ten assays	<input type="button" value="Add Code"/>
0003M	Liver disease, ten assays	<input type="button" value="Add Code"/>
0004M	Scoliosis DNA analys, saliva	<input type="button" value="Add Code"/>
0005F	Osteoarthritis composite	<input type="button" value="Add Code"/>
0005M	Fetal aneuploidy DNA analys	<input type="button" value="Add Code"/>
0006M	Onc hep gene risk classifier	<input type="button" value="Add Code"/>
0007M	Onc gastro 51 gene nomogram	<input type="button" value="Add Code"/>
0008M	Onc breast risk score	<input type="button" value="Add Code"/>

Create Institutional Claims

To create an institutional claim, select this option at the top:



The product is broken into 5 sections for data entry: *Patient Information*, *Payer Information*, *Provider Information*, *Claim Information*, and *Service Line Information*.



A few key features under each of these tabs are included below:

Patient Information

Patient Account #: The user may select the *Auto Generate Account* box to have a patient account number automatically assigned, otherwise they may enter their own in the free text box. The account number that is submitted on the claim will also update in the patient profile.

Search Patient: This will allow the user to select a patient with an existing profile (see more on creating patient profiles on page 20). If a patient is selected, all information from the patient profile will automatically populate in the corresponding fields.

Please note that once a claim is submitted and if the *Search Patient* feature wasn't used, the system will automatically check if there is an existing patient profile with that account number already. If there is not, it will save the patient as a new patient profile. To eliminate the chance of creating multiple patient profiles for the same patient, we recommend using the Search Patient option when a patient profile already exists.

Provider Information

Search Billing Provider: This will pull up a list of all providers that we have on file for the client's account.

Search Pay To Provider

Search Attending Provider: This will pull up a list of all providers that we have on file for the client's account.

Search Operating Provider

Search Rendering Provider: This will pull up a list of all rendering providers that we have on file for the client's account.

Search Service Facility: This will pull up a list of all service facilities that we have on file for the client's account.



Claim Information

Industry Codes: Each of these is a look up feature for the indicated field that allows you to search by the code or description. Simply enter your data and the results will pull anything with the specified digits. Once you identify your needed code, select the "add code" and it will populated in the chosen box

Claim Information:

Claim Information

▼ Claim Info

Medical Record Number:	<input type="text"/>		
Type Of Bill	<input type="text"/> ▼ *	Facility Code	<input type="text"/> ▼ *
Statement Date:	<input type="text"/> 	Start	<input type="text"/> 

Diagnosis Codes:

▼ Attachments

Type of Document:

How Attachment is Sent:


Attachment Control Number:

Service Line Information

Add Service Line: This will add an additional service line to the top, pushing existing service lines down a line

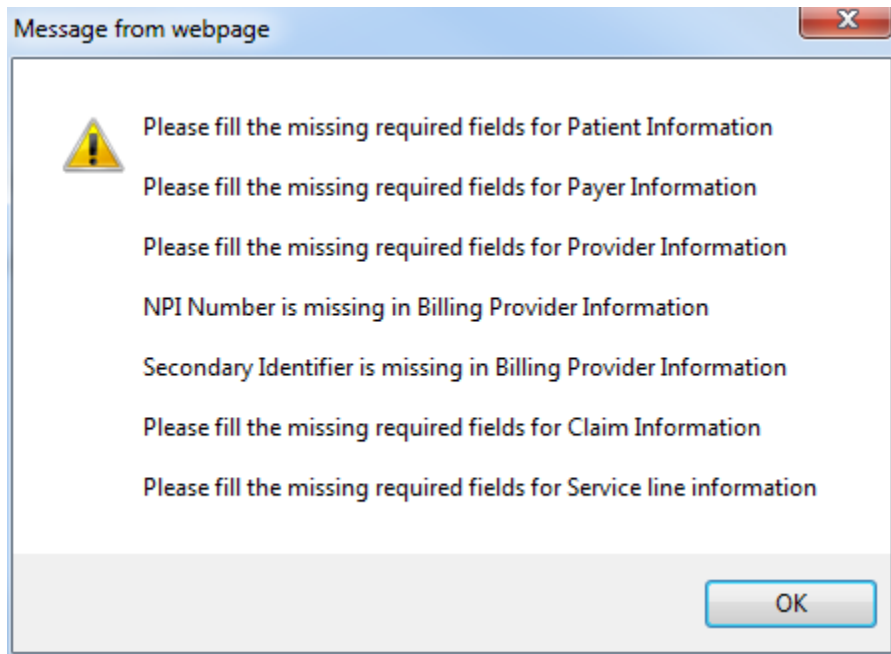
Move Service Line: This will move a service line up by one service line

Delete Service Line: This will delete the indicated service line

CPT/HCPCS Code  : This will allow you to search by the code or description. Simply enter your data and the results will pull anything with the specified digits. Once you identify your needed code, select the diagnosis code box you would like it to appear in and then “*add code*” and it will be populated in the chosen box

Test/Save a Claim

Once all claim information has been entered you must first select the *Test* button. If there are any errors, they will be displayed.



You may then either correct the issue(s) or select **Save** to save the claim to the Manage Claims Submission List.

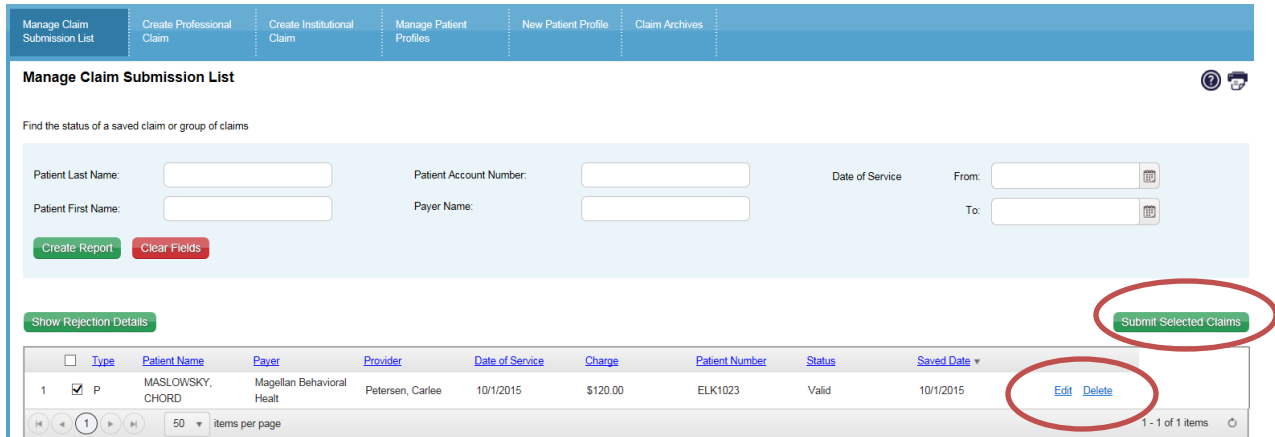
Once errors are fixed the user can click test again and the error section will go away if everything has been corrected.

Please note that you cannot select the **Save** option until the claim has first been tested. Once tested, this option will no longer be grayed out and will be available for selection.

Submit a Claim

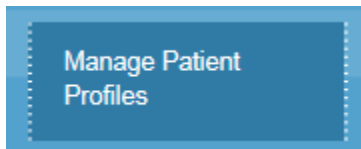
Once your claim data has been entered, tested, and saved, the claim will show up in the Manage Claims Submission List. If the status is listed as **Valid**, the claim has passed the first level edits and is ready to be submitted to the payer. Select the checkbox to the corresponding claim and choose the **Submit Selected Claims** box.

If the status is listed as **Invalid**, then corrections will need to be made to the claim before it can be submitted. Simply select the **Edit** option to make the necessary changes.



Manage Patient Profiles

To view a list of all patient profiles in the SimpleClaim product, simply select this option from the ribbon at the top:



Search, View, and Edit Patient Profiles

- Search:** You can search for a particular patient's profile by using the search fields at the top. Simply type in one of the fields using a full or partial name and the results will pull any patients with the specified characters. Once search criteria is entered, select *Create Report* or you can use the *Clear Fields* option to start your search over.
- Edit:** The results will be displayed at the bottom of the page. Simply select the patient account that you would like to view and it will open their full profile. The patient's profile will be displayed on 2 tabs: Patient Information and Payer Information

You can make any necessary changes to the patient's profile from here. Once changes are made, be sure to select the *Save* button before leaving the screen. This will only change their profile on future claims, previously submitted claims will not reflect the changes

Manage Patient Profiles



Patient Last Name: Insured ID:
 Patient First Name: Patient Account Number:
 Show Archived Patients
 Create Report Clear Fields

	Patient Account #	Patient Name	Date of Birth	Insured Id	Payer	Provider	
1	1234567890000	TESTTEST, Jennifer	1/1/1991			Crabb	Edit
2	0000149	TEST, JIM	2/5/1989	987654321	Affinity Medical Solutions	Doe	Edit
3	0000146	LAHIVE, MARY	1/1/2001	WXY547A22807	Blue Cross of California - UB		Edit
4	558245	August, John	1/15/1990	15483124	Blue Cross and Blue Shield of Illinois	OD PC dba HealthDrive Ey	Edit
5	000098	LAHIVE, MARY	3/7/1967	WXY547A22807	Blue Cross of California - UB	Doe	Edit
6	000089	Wanka, Annie	10/15/1982	8745264	Cigna	Crabb	Edit

10 items per page 1 - 6 of 6 items

Manage Patient Profiles

Patient Last Name: Insured ID:
 Patient First Name: Patient Account Number:
 Show Archived Patients
 Create Report Clear Fields

View a patient profile and make edits:

Manage Patient Profile



LAHIVE, MARY

Cancel Save Save & Create Claim

Archive Patient

Patient Information Payer Information

Patient Information Clear Fields * = Required Fields

Patient Account #: *
 Auto Generated Account
 Patient Name: First: * Last: * MI: Suffix:
 Patient Address: Street: City: State: ZIP:
 Patient DOB: *
 Patient Sex: Male Female *
 Phone #: Relation to Insured:

Create Claim from Patient Profile

Once you locate and open a patient's saved profile, you can make any needed changes and select *Save & Create Claim* to generate a new claim from this screen.

Manage Patient Profile



LAHIVE, MARY

Cancel Save Save & Create Claim

Archive Patient

Archiving/Activating Patients

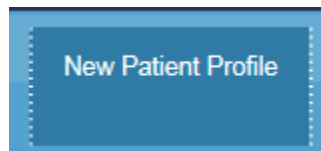
The Manage Patient Profiles view will default to only display active patient accounts.

- **View Archived Patients:** Simply check the box under the search options for *Show Archived Patients*.
- **Archive a Patient:** Once in a specific patient's profile, check the *Archive Patient* box in the upper right hand corner
- **Activate a Patient:** Once in a specific patient's profile, un check the *Archive Patient* box in the upper right hand corner



New Patient Profile

To create a new patient profile, simply select this option from the ribbon at the top:





Patient profiles can be created and saved for each patient a claim will be submitted for, prior to submitting the claim.

You may select the *Auto Generate Account* box to have a patient account number automatically assigned, otherwise you may enter your own in the free text box..

The patient's profile will be displayed on 2 tabs: Patient Information and Payer Information. The user will want to be sure to populate all required fields in both sections.

Please note that patient profiles can also be created from a submitted claim. Once a claim is submitted, it will check if there is an existing patient profile with that account number already. If there is not, it will save the patient as a new patient profile. To eliminate the chance of creating multiple patient profiles for the same patient, we recommend to use the Search Patient option when a patient profile already exists.

New Patient Profile

Cancel
Save
Save & Create Claim

Archive Patient

Patient Information

Payer Information

Patient Information

Clear Fields

* = Required Fields

Patient Account #: *

Auto Generated Account

Patient Name: First * Last * MI Suffix

Patient Address: Street City State ZIP

Patient DOB: *

Patient Sex: Male Female *

Phone #: Relation to Insured

Provider Information

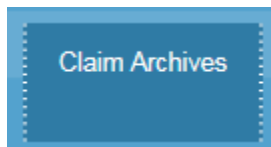
Select Rendering Provider

Rendering Provider:

Referring Provider Name: Last First

Claim Archives

Claim Archives can be viewed by simply selecting this option from the ribbon at the top:



Claim Archives shows all previously submitted claims using the SimpleClaim product. This view defaults to showing the newest submission date on top. Claims can be edited and saved for resubmission from this section. Please note that a copy of the original claim will still remain in the archives.

- **Search:** You can search for a previously submitted claim by using the search fields at the top. Simply type in one of the fields using full or partial data and the results will pull any claims with the specified characters. Once search criteria is entered, select Create Report or you can use the Clear Fields option to start your search over.
- **View:** The results will be displayed at the bottom of the page. Simply select the claim that you would like to view and it will open all 5 sections of the claim.
- **Edit and Save:** You can make any necessary changes to the claim from here and save it for resubmission. Once changes are made, you must first select the Test Claim option to identify any errors. You may then select the Save Claim button which will save the claim back to the Manage Claims Submission List for resubmission. Please note that a copy of the original claim will still remain in the archives.

The user can double click and the claim detail will open.

Manage Claim Submission List | Create Professional Claim | Create Institutional Claim | Manage Patient Profiles | New Patient Profile | Claim Archives

Search Claim

Find a previously submitted claim or group of claims

Patient Last Name: Patient Account Number:

Patient First Name: Payer Name:

Date of Service From: To: Submission Date: From: To:

[Create Report](#) [Clear Fields](#)

Type	Patient Name	Payer	Provider	Date of Service	Charge	Patient Number	Status	Submission Date
1 P	August, John	TEST PAYER	Lynda Hargroves	9/30/2015	\$65.00	558245	Valid	9/30/2015

10 items per page 1 - 1 of 1 items

The save and test options have been grayed out until something has been edited or added. Once new information has been added, the test button becomes active. When the user saves the claim, it is created as a new claim and will appear in the Manage Submissions List.

Sent Claim Detail

[Test Claim](#) [Cancel](#) [Save Claim](#)

Patient Information | Payer Information | Provider Information | Claim Information | Service Line Information

Patient Information

[Search Patient](#) [Clear Fields](#)

Patient Account #: 558245 Auto Generated Account

Patient Name: First: John Last: August MI: E Suffix: * = Required Fields

Patient Address: Street: 22525 Rusty Road City: SMITH State: IL ZIP: 62223

Patient DOB: 1/15/1990

Patient Sex: Male Female

Phone #: Relation to Insured: Self

Release of Information Code: Yes, Provider has a Signed Statement