

View a Patient's Claims

Last Modified on 08/08/2022 11:30 am EDT

Version 20.17

About

The Claims section of the Patient Chart houses a patient's full claims history including, claim service dates and charges, claim payments, adjustments, and patient responsibility. Generally, claims are listed in chronological order with the most recent date of service at the top. To reorder the dates of service, click the **Claim #** column header to bring the oldest date to the top. Claims can be viewed by Status and by Date Range. The default selection for both of these is **All**.

View a Patient's Claims

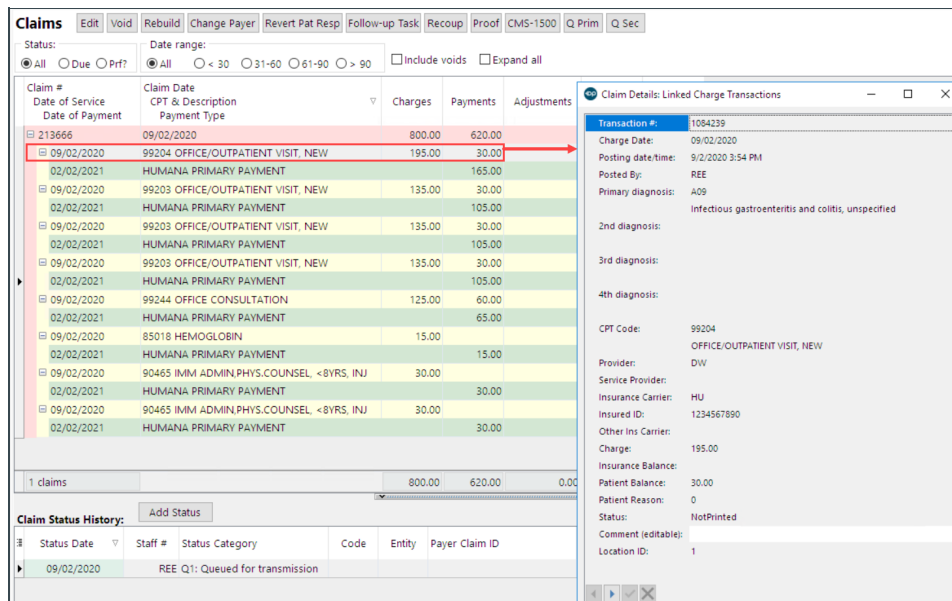
1. Navigate to the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button**
2. Search for and select the patient, if not already selected.
3. Click **Claims** in the Window Navigation Panel.
4. To expand and view a claims details, click **+** to the left of the claim number you want to expand, or select the **Expand all** checkbox to expand all claims. If you want to include voided transactions, select the **Include voids** checkbox. The following details are displayed:

- Charge lines are displayed in yellow.
- Patient transactions are displayed in pink.
- Insurance transactions are displayed in green.

View Claim Line Details

To view further details of a Claim, Payment, Adjustment, or Patient Responsibility line, double-click the line.

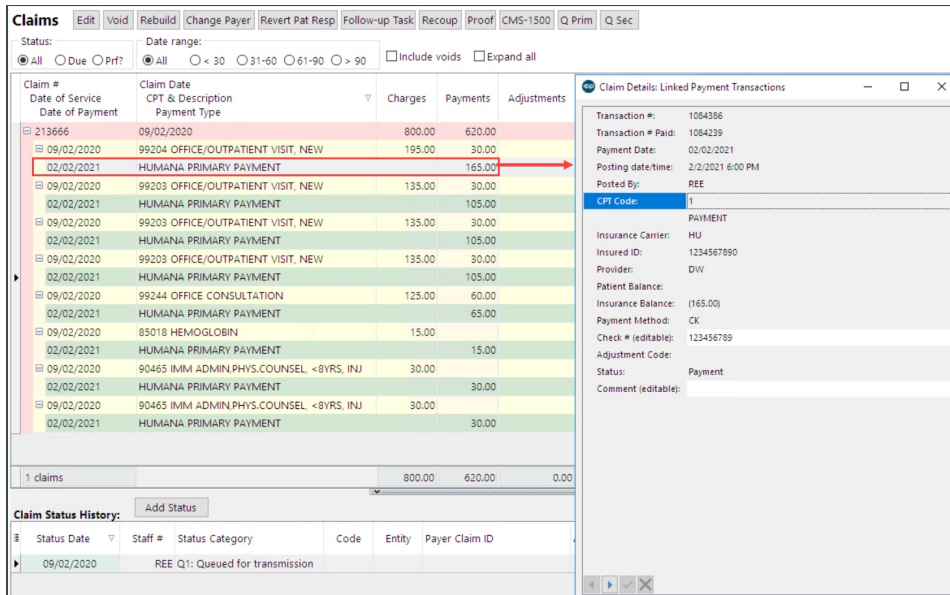
- Double-clicking a **Charge line**. The **Claim Details: Linked Charge Transactions** window is displayed where you can view more detailed claim information. View the image below to see all of the information included in this detail.



The screenshot shows the 'Claims' window with a table of claims and a 'Claim Details: Linked Charge Transactions' window open. The table lists claim numbers, dates of service, descriptions, charges, payments, and adjustments. The 'Claim Details' window shows information for transaction 11084239, including charge date, posting date, primary diagnosis, CPT code, and insurance carrier.

Claim #	Date of Service	Date of Payment	Claim Date	CPT & Description	Payment Type	Charges	Payments	Adjustments
213666	09/02/2020	09/02/2020	09/02/2020	99204 OFFICE/OUTPATIENT VISIT, NEW		800.00	620.00	
	02/02/2021			HUMANA PRIMARY PAYMENT			165.00	
	09/02/2020			99203 OFFICE/OUTPATIENT VISIT, NEW		135.00	30.00	
	02/02/2021			HUMANA PRIMARY PAYMENT			105.00	
	09/02/2020			99203 OFFICE/OUTPATIENT VISIT, NEW		135.00	30.00	
	02/02/2021			HUMANA PRIMARY PAYMENT			105.00	
	09/02/2020			99203 OFFICE/OUTPATIENT VISIT, NEW		135.00	30.00	
	02/02/2021			HUMANA PRIMARY PAYMENT			105.00	
	09/02/2020			99244 OFFICE CONSULTATION		125.00	60.00	
	02/02/2021			HUMANA PRIMARY PAYMENT			65.00	
	09/02/2020			85018 HEMOGLOBIN		15.00		
	02/02/2021			HUMANA PRIMARY PAYMENT			15.00	
	09/02/2020			90465 INM ADMIN.PHYS.COUNSEL <8YRS, INJ		30.00		
	02/02/2021			HUMANA PRIMARY PAYMENT			30.00	
	09/02/2020			90465 INM ADMIN.PHYS.COUNSEL <8YRS, INJ		30.00		
	02/02/2021			HUMANA PRIMARY PAYMENT			30.00	

- Double-clicking a **Payment line** (patient or insurance) will open the **Claim Details: Linked Payment Transactions** window. View the image below to see all of the information included in this detail.



Claims | Edit | Void | Rebuild | Change Payer | Revert Pat Resp | Follow-up Task | Recoup | Proof | CMS-1500 | Q Prim | Q Sec

Status: All Due Prf? Date range: All < 30 31-60 61-90 > 90 Include voids Expand all

Claim #	Date of Service	Date of Payment	Claim Date	CPT & Description	Payment Type	Charges	Payments	Adjustments
213666	09/02/2020	09/02/2020	09/02/2020	99204 OFFICE/OUTPATIENT VISIT, NEW	HUMANA PRIMARY PAYMENT	800.00	620.00	
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		195.00	30.00	165.00
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		135.00	30.00	105.00
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		135.00	30.00	105.00
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		135.00	30.00	105.00
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		125.00	60.00	65.00
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		15.00	15.00	
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		30.00	30.00	
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		30.00	30.00	
		02/02/2021	02/02/2021	HUMANA PRIMARY PAYMENT		30.00	30.00	

1 claims | 800.00 | 620.00 | 0.00

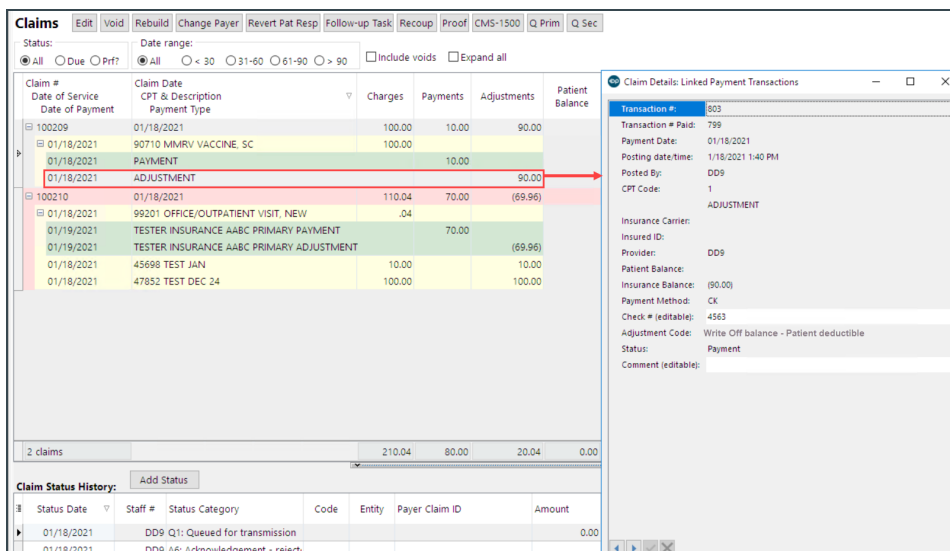
Claim Status History: Add Status

Status Date	Staff #	Status Category	Code	Entity	Payer Claim ID
09/02/2020		REE Q1: Queued for transmission			

Claim Details: Linked Payment Transactions

Transaction #: 1084386
 Transaction # Paid: 1084239
 Payment Date: 02/02/2021
 Posting date/time: 2/2/2021 6:00 PM
 Posted By: REE
 CPT Code: 1
 Insurance Carrier: HU
 Insured ID: 1234567890
 Provider: DIV
 Patient Balance:
 Insurance Balance: (165.00)
 Payment Method: CK
 Check # (editable): 123456789
 Adjustment Code:
 Status: Payment
 Comment (editable):

- Double-clicking an **Adjustment** line (patient or insurance). The **Claim Details: Linked Payment Transactions** window is displayed. View the image below to see all of the information included in this detail.



Claims | Edit | Void | Rebuild | Change Payer | Revert Pat Resp | Follow-up Task | Recoup | Proof | CMS-1500 | Q Prim | Q Sec

Status: All Due Prf? Date range: All < 30 31-60 61-90 > 90 Include voids Expand all

Claim #	Date of Service	Date of Payment	Claim Date	CPT & Description	Payment Type	Charges	Payments	Adjustments	Patient Balance
100209	01/18/2021	01/18/2021	01/18/2021	90710 MMRV VACCINE, SC	PAYMENT	100.00	10.00	90.00	
		01/18/2021	01/18/2021	ADJUSTMENT		100.00	10.00	90.00	
100210	01/18/2021	01/18/2021	01/18/2021	99201 OFFICE/OUTPATIENT VISIT, NEW	TESTER INSURANCE AABC PRIMARY PAYMENT	110.04	70.00	(69.96)	
		01/19/2021	01/19/2021	TESTER INSURANCE AABC PRIMARY ADJUSTMENT		.04	70.00	(69.96)	
		01/18/2021	01/18/2021	45698 TEST JAN		10.00	10.00		
		01/18/2021	01/18/2021	47852 TEST DEC 24		100.00	100.00		

2 claims | 210.04 | 80.00 | 20.04 | 0.00

Claim Status History: Add Status

Status Date	Staff #	Status Category	Code	Entity	Payer Claim ID	Amount
01/18/2021		DD9 Q1: Queued for transmission				0.00
01/18/2021		DD9 A6: Acknowledgement - reject.				

Claim Details: Linked Payment Transactions

Transaction #: 803
 Transaction # Paid: 799
 Payment Date: 01/18/2021
 Posting date/time: 1/18/2021 1:40 PM
 Posted By: DD9
 CPT Code: 1
 Insurance Carrier:
 Insured ID:
 Provider: DD9
 Patient Balance:
 Insurance Balance: (90.00)
 Payment Method: CK
 Check # (editable): 4563
 Adjustment Code: Write Off balance - Patient deductible
 Status: Payment
 Comment (editable):

- If there is a **Patient Responsibility**, click it for further details.

Version 20.16

About

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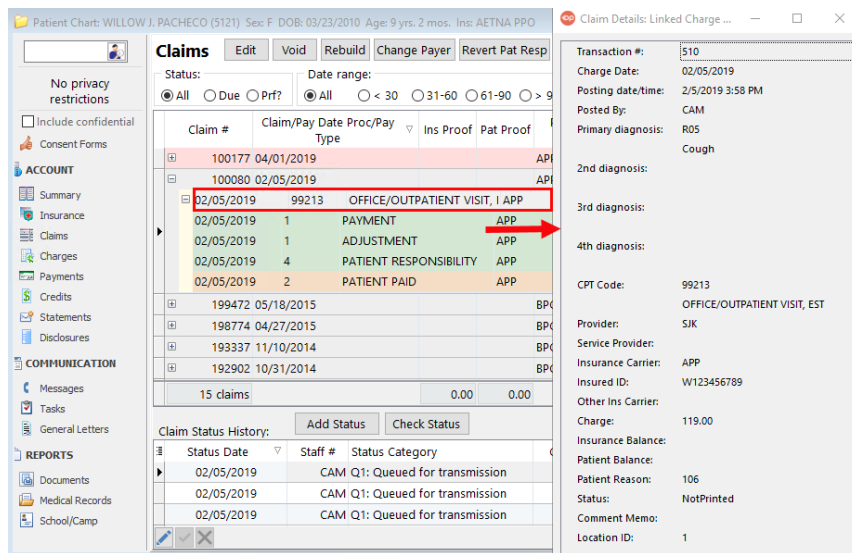
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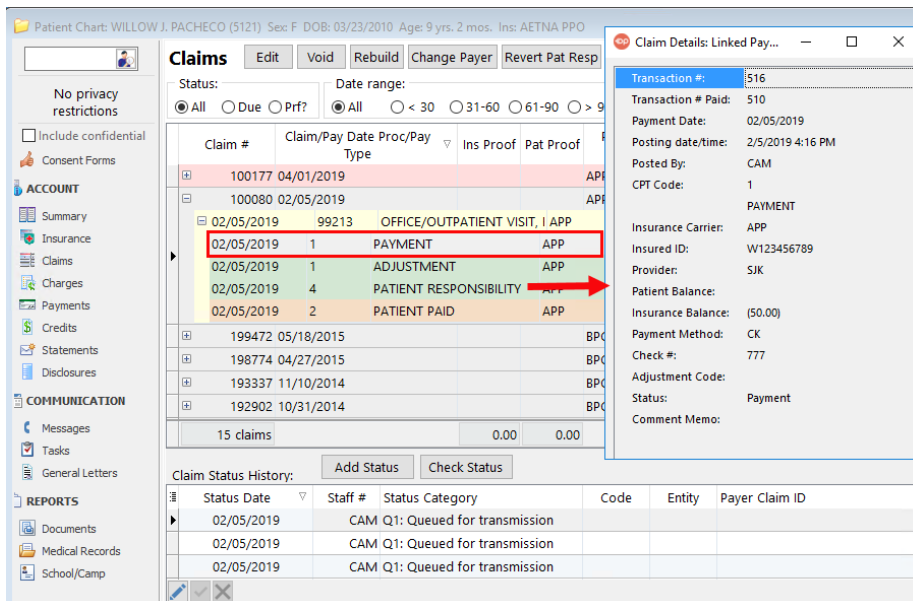
- Double-click a **Charge line**. The Claim Details: Linked Charge Transactions window is displayed where you can view more detailed claim information. View the image below to see all of the information included in this detail.



The screenshot shows the 'Claims' window for patient WILLOW J. PACHECO (5121). The 'Claims' table lists several claims, with the claim 02/05/2019 99213 OFFICE/OUTPATIENT VISIT, I APP highlighted in yellow. The 'Claim Details: Linked Charge Transactions' window is open, displaying the following information:

Transaction #:	510
Charge Date:	02/05/2019
Posting date/time:	2/5/2019 3:58 PM
Posted By:	CAM
Primary diagnosis:	R05 Cough
2nd diagnosis:	
3rd diagnosis:	
4th diagnosis:	
CPT Code:	99213 OFFICE/OUTPATIENT VISIT, EST
Provider:	SIK
Service Provider:	
Insurance Carrier:	APP
Insured ID:	W123456789
Other Ins Carrier:	
Charge:	119.00
Insurance Balance:	
Patient Balance:	
Patient Reason:	106
Status:	NotPrinted
Comment Memo:	
Location ID:	1

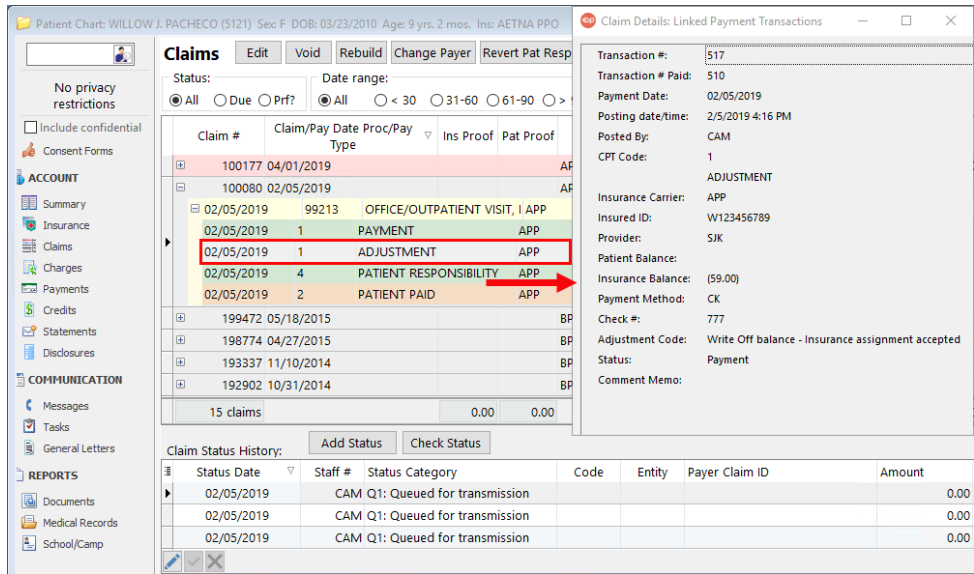
- Double-clicking a **Payment line** (patient or insurance) will open the **Claim Details: Linked Payment Transactions** window. View the image below to see all of the information included in this detail.



The screenshot shows the 'Claims' window for patient WILLOW J. PACHECO (5121). The 'Claims' table lists several claims, with the claim 02/05/2019 99213 OFFICE/OUTPATIENT VISIT, I APP highlighted in yellow. The 'Claim Details: Linked Payment Transactions' window is open, displaying the following information:

Transaction #:	516
Transaction # Paid:	510
Payment Date:	02/05/2019
Posting date/time:	2/5/2019 4:16 PM
Posted By:	CAM
CPT Code:	1 PAYMENT
Insurance Carrier:	APP
Insured ID:	W123456789
Provider:	SIK
Patient Balance:	
Insurance Balance:	(50.00)
Payment Method:	CK
Check #:	777
Adjustment Code:	
Status:	Payment
Comment Memo:	

- Double-click an **Adjustment** line (patient or insurance). The Claim Details: Linked Payment Transactions window is displayed. View the image below to see all of the information included in this detail.



The screenshot displays the 'Claims' window for patient Willow J. Pacheco. The 'Claims' table lists various transactions, with the 'ADJUSTMENT' line highlighted in red. A red arrow points from the 'PATIENT RESPONSIBILITY' line to the 'ADJUSTMENT' line. The 'Claim Details: Linked Payment Transactions' window is open, showing details for transaction # 517, including payment date, posting time, and insurance carrier information.

Claim #	Claim/Pay Date	Proc/Pay Type	Ins Proof	Pat Proof
100177	04/01/2019			AP
100080	02/05/2019			AP
02/05/2019	99213	OFFICE/OUTPATIENT VISIT, I		APP
02/05/2019	1	PAYMENT		APP
02/05/2019	4	PATIENT RESPONSIBILITY		APP
02/05/2019	2	PATIENT PAID		APP
199472	05/18/2015			BP
198774	04/27/2015			BP
193337	11/10/2014			BP
192902	10/31/2014			BP
15 claims:			0.00	0.00

Status Date	Staff #	Status Category	Code	Entity	Payer Claim ID	Amount
02/05/2019		CAM Q1: Queued for transmission				0.00
02/05/2019		CAM Q1: Queued for transmission				0.00
02/05/2019		CAM Q1: Queued for transmission				0.00

- If there is a **Patient Responsibility**, click it for further details.