

Patient Chart: Claims

Last Modified on 12/28/2022 8:48 am EST

Version 21.0



This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

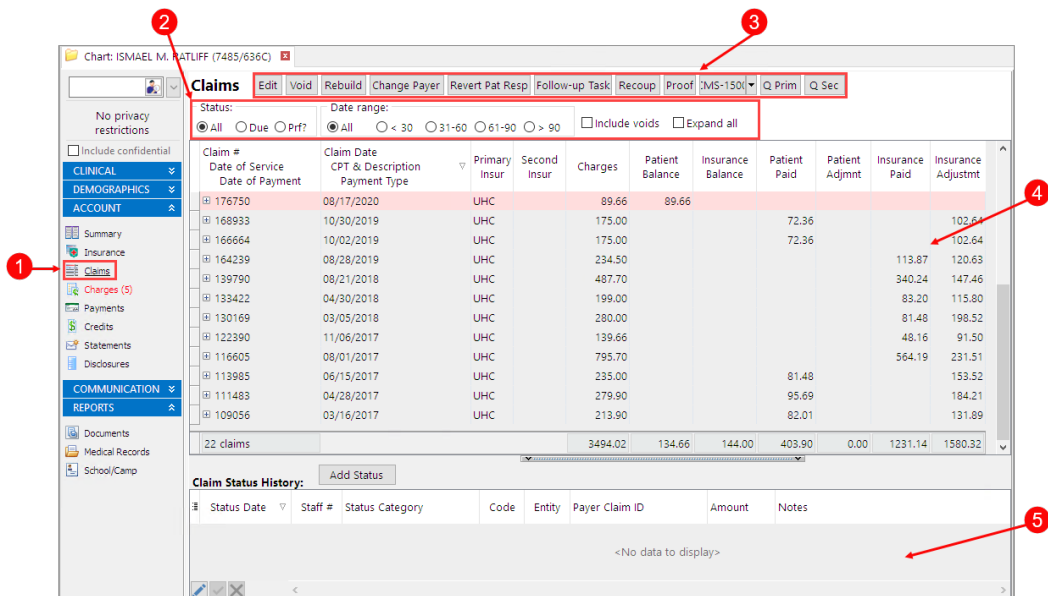
About Patient Chart: Claims

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Claims

The Claims window displays a list of the patient's claims with open claims highlighted in red. You can create tasks, recoup claims, rebuild claims, check transactions, change a payer, revert patient responsibility, and queue primary or secondary payers.



Note: Just like a paper chart, the electronic chart in OP contains personal health information and should be kept protected and confidential. Always close all windows on your screen and log out of OP when you are not at your workstation.



The screenshot shows the 'Claims' window for patient ISMAEL M. RATLIFF (7485/636C). The window includes a menu bar with options like 'Edit', 'Void', 'Rebuild', 'Change Payer', etc. A table lists claims with columns for Claim #, Date of Service, Claim Date, CPT & Description, Payment Type, Primary Insur, Second Insur, Charges, Patient Balance, Insurance Balance, Patient Paid, Patient Adjmt, Insurance Paid, and Insurance Adjustmt. One claim (176750) is highlighted in red. A 'Claim Status History' table is at the bottom, currently showing '<No data to display>'. Red callouts 1-5 point to the Claims button, filter options, a claim row, a claim amount, and the status history table respectively.

Patient Chart: Claims

Number	Section	Description
1	Claims button	The Claims button opens the patient's Claims window.
2	Claim Display criteria	The Claim Display criteria selections determine what claims are displayed in the grid. Criteria are determined by Status and Date range. You can also include voids in the list and expand the details for all listed claims.

3	Claim Action buttons	<p>The buttons listed across the top of the window are used to perform the following actions for the selected claim:</p> <ul style="list-style-type: none"> • Edit: Opens the Edit Archived Claim Transactions window where you can edit the claim • Void: Voids the selected claim • Rebuild: Rebuilds all claims for archived transactions. This recalculates the values on the claim to fix any out-of-proof values listed on an individual claim. • Change Payer: Changes the payer for any unpaid transactions • Revert Pat Resp: Reverts any conditionally assigned patient responsibility on a selected claim • Follow-up Task: Opens the Add Tasks to a Patient's Checklist window where you can create a Task for the selected claim • Recoup: Recoup all insurance payments for the entire selected claim • Proof: Opens the Account Proof window to check the transactions for inconsistencies in values for insurance or patient balances • CMS-1500: Prints paper claims for the selected claim • Q Prim: Moves the selected claim(s) in the queue for submission to the primary payer • Q Sec: Moves the selected claim(s) in the queue for submission to the secondary payer
4	Claim List grid	<p>The Claim List grid displays the patient's list of claims with open claims highlighted in red. Individual claims can be collapsed and expanded by clicking +/- to the left of the claim number. Expanding a claim displays the transactions (payments, adjustments) associated with the claim. Double-clicking on a claim will open the Claim Details window, where you can add a Claim Note note to the claim.</p>
5	Claim Status History grid	<p>The Claim Status History grid displays the status history for the selected claim in the Claim List grid. Statuses can be added by clicking the Add Status button.</p>

Version 20.18



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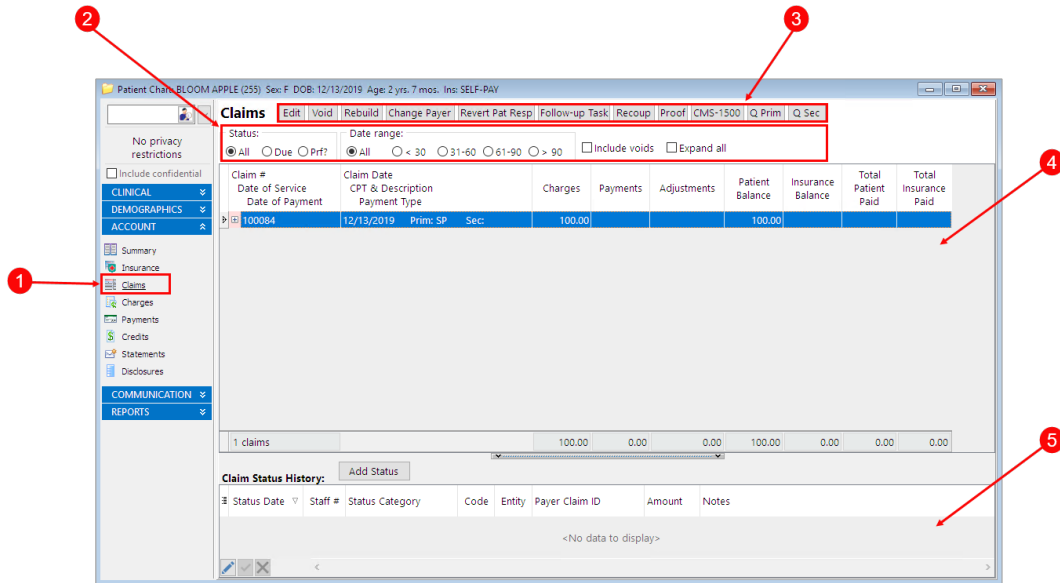
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