

# Claim Status



## Claim Status

Claim Status selections are used for doing more refined but quicker searches:

<p>On the <b>Provider/Team</b> menu, <b>Work List</b> tab</p>	
<p>On the <b>Patient</b> menu, <b>Claim Ledger</b> tab, <b>Status</b> tab</p>	

# Claim Status

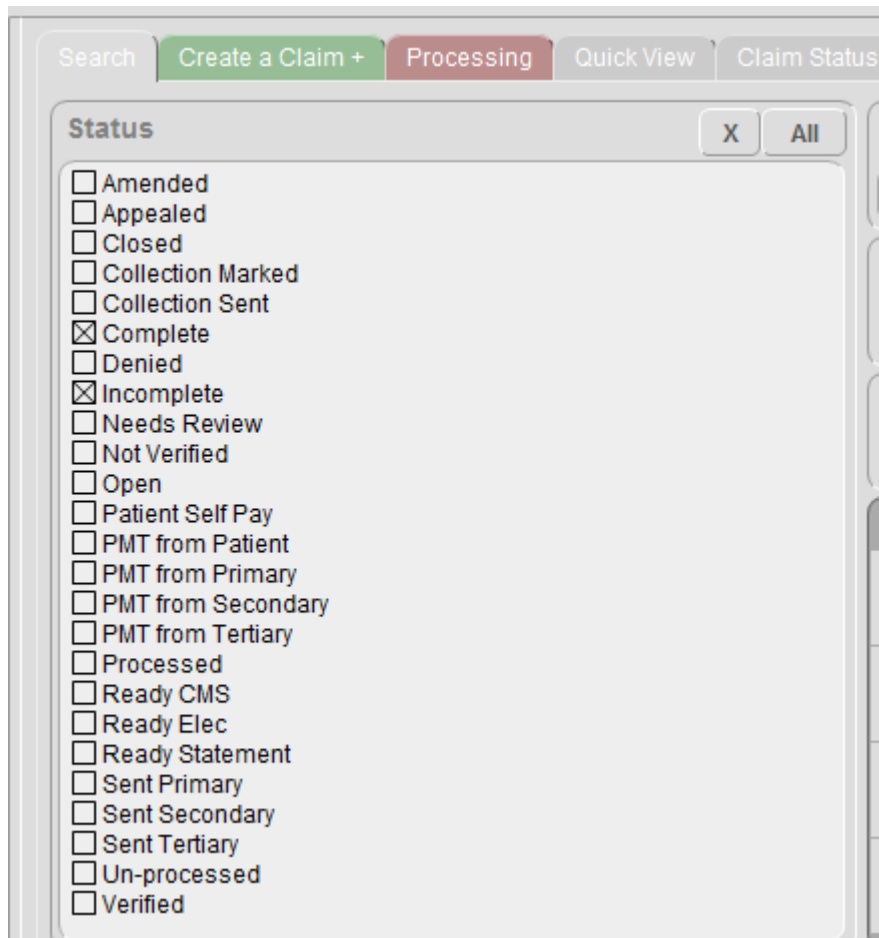
Updating a claim on the **Status** tab in the **Entry** or **Ledger** screens

The screenshot displays a software interface for managing claim statuses. At the top, there is a navigation bar with buttons for 'Entry' and 'Ledger'. Below this, a 'Status' tab is active, showing a 'Claim Open' button with a green 'Y' and a red minus sign. A list of claim statuses is shown on the left, with 'Open' highlighted in green. On the right, a table titled 'Edit Transaction' shows transaction details for '09/04/09'.

TR Date	Tc
09/04/09	55
09/04/09	45
09/04/09	45
09/04/09	135

# Claim Status

On the  
**Claims/Invoices**  
menu, **Search** tab



The screenshot shows a software interface for filtering claim statuses. At the top, there are tabs: 'Search', 'Create a Claim +' (highlighted in green), 'Processing' (highlighted in red), 'Quick View', and 'Claim Status'. Below the tabs is a 'Status' filter window with a title bar containing 'X' and 'All' buttons. The window contains a list of 25 status options, each with a checkbox. The 'Complete' and 'Incomplete' checkboxes are checked.

Status	Selected
<input type="checkbox"/> Amended	
<input type="checkbox"/> Appealed	
<input type="checkbox"/> Closed	
<input type="checkbox"/> Collection Marked	
<input type="checkbox"/> Collection Sent	
<input checked="" type="checkbox"/> Complete	Yes
<input type="checkbox"/> Denied	
<input checked="" type="checkbox"/> Incomplete	Yes
<input type="checkbox"/> Needs Review	
<input type="checkbox"/> Not Verified	
<input type="checkbox"/> Open	
<input type="checkbox"/> Patient Self Pay	
<input type="checkbox"/> PMT from Patient	
<input type="checkbox"/> PMT from Primary	
<input type="checkbox"/> PMT from Secondary	
<input type="checkbox"/> PMT from Tertiary	
<input type="checkbox"/> Processed	
<input type="checkbox"/> Ready CMS	
<input type="checkbox"/> Ready Elec	
<input type="checkbox"/> Ready Statement	
<input type="checkbox"/> Sent Primary	
<input type="checkbox"/> Sent Secondary	
<input type="checkbox"/> Sent Tertiary	
<input type="checkbox"/> Un-processed	
<input type="checkbox"/> Verified	

## Claim Status

Searching for claim (s)  
in the **Claim Query**

You may add your own custom claim status (see below). However, you want to be specific about adding additional claim statuses and try not to overlap too much, thus defeating the purpose of isolating the searches.

- Every claim when created has default statuses that are automatically selected. These were set up in the **Preferences** menu, **Claims** tab, **Default Claim Status** tab as the users defined defaults for a new claim.

# Claim Status

Organization Claims Status General Path **Program Defaults** Maintenance

Default Printer Default Form Default Claim Status Other

Default Claim Status

- Amended
- Appealed
- Closed
- Collection Marked
- Collection Sent
- Complete
- Denied
- Incomplete
- Needs Review
- Not Verified
- Open
- Patient Self Pay
- PMT from Patient
- PMT from Primary
- PMT from Secondary
- PMT from Tertiary
- Processed
- Ready CMS
- Ready Elec
- Ready Statement
- Sent Primary
- Sent Secondary
- Sent Tertiary
- Un-processed
- Verified

- On a system level the default status are selected from the **Program Defaults** tab, **STA** tab, **2** tab.

Organization Claims Status General Path **Program Defaults** Maintenance

STA KWD PROV PLT FRM MIS ELEC AGE PATH PATH 2 AUX HELP

1 2 3 4 5 6

Default Patient Status

- Active
- Alert
- Collection
- Deceased
- Inactive
- Monthly Statement
- Patient Credit

Default Claim Status

- Amended
- Appealed
- Closed
- Collection Marked
- Collection Sent
- Complete
- Denied
- Incomplete
- Needs Review
- Not Verified
- Open
- Patient Self Pay
- PMT from Patient
- PMT from Primary
- PMT from Secondary
- PMT from Tertiary
- Processed
- Ready CMS
- Ready Elec
- Ready Statement
- Sent Primary
- Sent Secondary
- Sent Tertiary
- Un-processed
- Verified

# Claim Status

## Creating a New Claim Status

- To create a new Claim Status go to the **Claims/Invoices** Menu and select the **Claim Status** tab.
- Click the green plus icon labeled “**Create a new Claim Status.**”



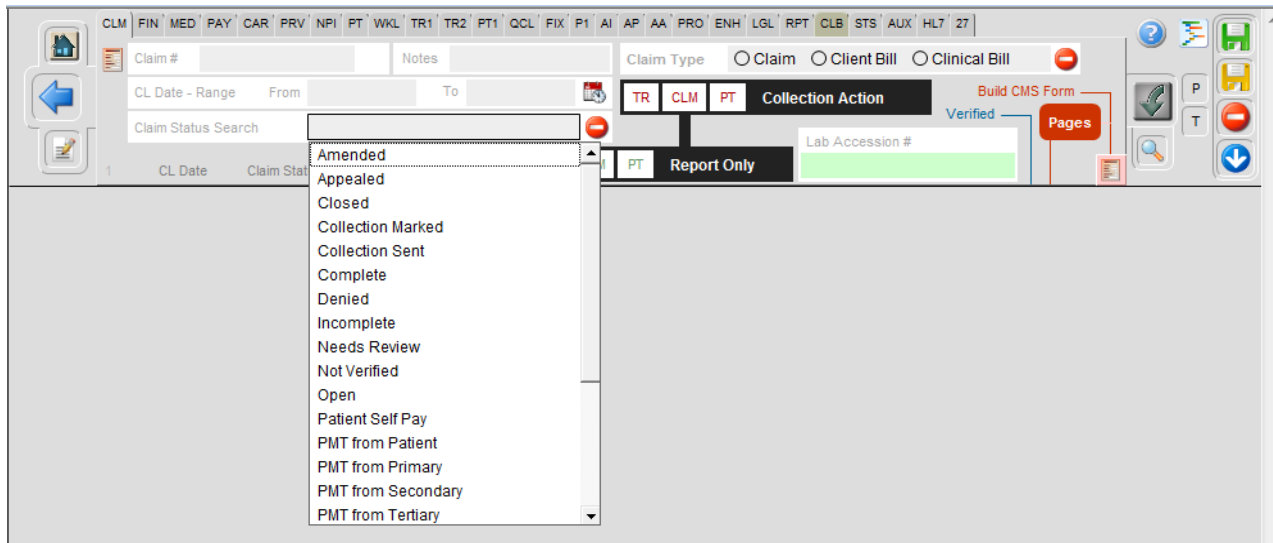
- Enter the “Status” name; keep it short. Then enter the “Description” of the claim status.
- You can choose to toggle off another status when this newly created status is selected by selecting the other status in the “Claim Status Toggle” field.

A screenshot of the 'Claim Status' form. The form has a title bar that says 'Claim Status'. Below the title bar, there are two input fields: 'ID' with the value 'EBA24' and 'Status' which is currently empty and highlighted in yellow. Below these fields is a large text area for 'Description'. At the bottom of the form is a section titled 'Claim Status Toggle' with the instruction '(Toggle this item off when "" is selected)'. This section contains a grid of checkboxes for various claim statuses. The statuses listed are: Amended, Appealed, Closed, Collection Marked, Collection Sent, Complete, Denied, Incomplete, Needs Review, Not Verified, Open, Patient Self Pay, PMT from Patient, PMT from Primary, PMT from Secondary, PMT from Tertiary, Processed, Ready CMS, Ready Elec, Ready Statement, Sent Primary, Sent Secondary, Sent Tertiary, Un-processed, and Verified.

# Claim Status

## Searching for Claim Status in the Claim Query

- Select the **Reports** menu and click the **Claim Query** button. Select the **CLM** tab to do a search by “Claim Status”.
- Clear the query by clicking the red minus icon on the right.
- Click the drop down in the “Claim Status Search” field and select the status to search.
- Click the blue down arrow to the right to perform the query and find the claims with that status.



- You can extend and add other claim statuses by clicking the “Claim Status Search” drop down again, making your selection and then clicking on the “E” to extend the claims to include that additional claim status.

Colmax B	11/16/2009	Open
Cassidy S	01/07/2010	Open
CLA7	12/16/2009	Elect
08/26/2009	05/21/2010	CMS
Cassidy, Sarah	08/09/2010	Elect
	09/08/2010	Elect
	10/08/2010	Collec
	10/08/2010	Collec
	10/22/2010	Custo

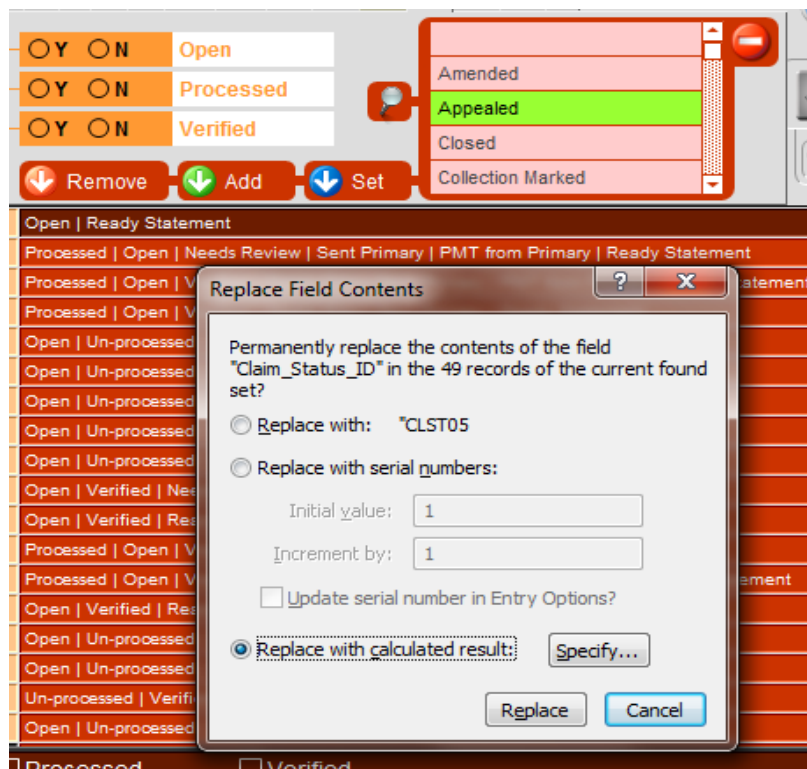
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### Replacing, Adding and Removing Claim Statuses

**Important:** These functions will change the statuses on ALL claims in the current found set of the current query. You can replace, add and remove statuses from claim records in batch. Use care when selecting claims and statuses to update as it cannot be undone!

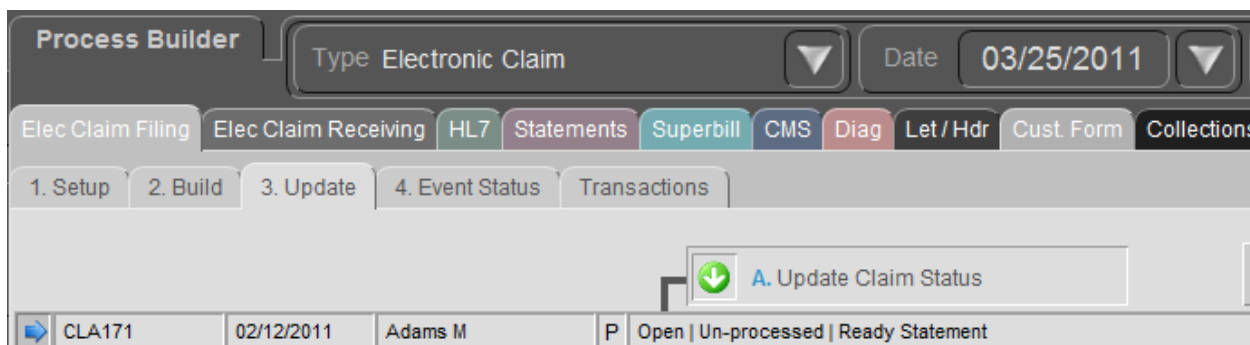
- Select the **Reports** menu and click the **Claim Query** button. Then select the **STS** tab to update the Claim Status.
- From a previously found set of claims, clear the status box by clicking on the red minus icon. You will see the green highlight disappear. Then choose which status you would like to **Remove**, **Add**, or **Set**. The status you selected will highlight green.
- You will need to confirm that you want to change the Claim statuses with your selection. Click **Replace** to update, or **Cancel** to leave the statuses unchanged.

## Claim Status



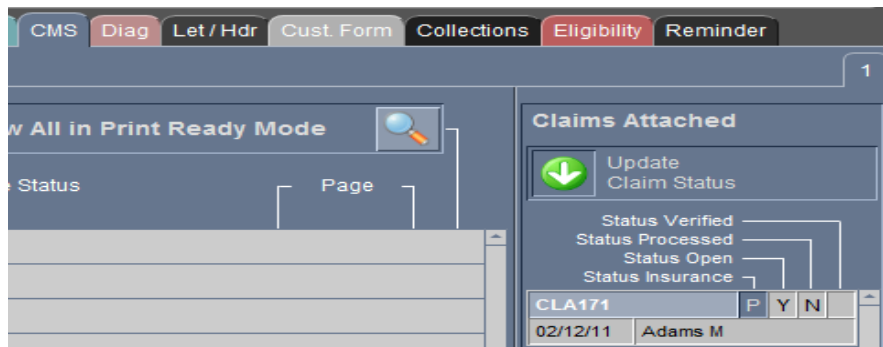
### Auto updates for Claim Status

- Claims are automatically updated by clicking a specific Update button or tab during some processing events in Easy Billing Professional including:
  - Claims batched electronically on the **3. Update** tab using the **“A. Update Claim Status”** icon.

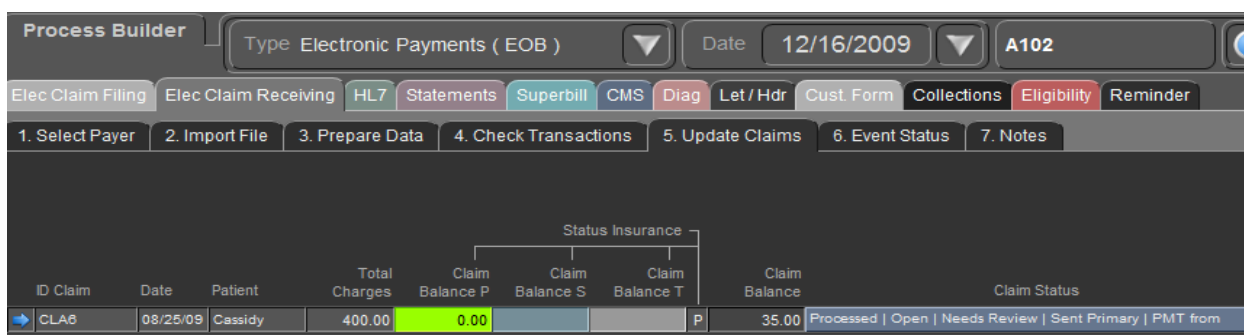


- Claims batched for CMS 1500 printing with the **“Update Claim Status”** icon,

# Claim Status



- o ERA auto payment posting, using “5. Update Claims” tab,



- o From the **Claim Query**, collection statuses are updated automatically when any of the Collection Action reports are created.

