CHECK LIST

(some features may vary if using a previous version, please stay current)

Create a New Patient

☐ Click the “New Patient” button

☐ Enter patient demographic information

☐ Enter Carriers (P / S / T) by clicking green plus icon, then select carrier from drop down triangle icon. Do not click more than once to enter. Click the Signature History tab to see if you have created any duplicates, keep one P / S / T per carrier

☐ Add Guarantor or Referral (not where to enter referring physicians) or Attorney

Create a New Claim

☐ Click “New Claim” button from patient demographics

☐ Enter charge lines or use template

☐ Go to “Condition” tab enter dates, dx codes, pointers

☐ Go to “Verify” tab, fix any errors, click to “Verify” claim

☐ Go to “Status” tab, add “Ready Elec” or “Ready CMS” for batching

☐ If printing “Superbill” or “CMS”, click status “Processed”

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