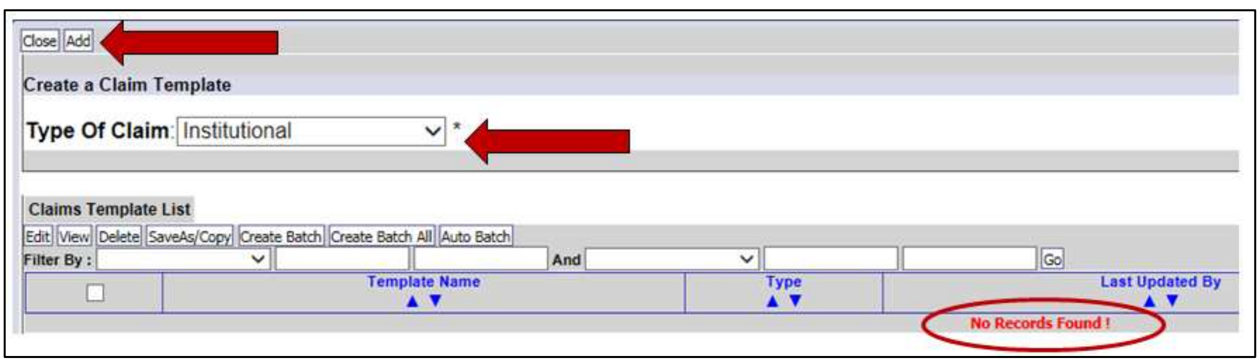
January 2013

Creating Templates and Submitting a Template Claim

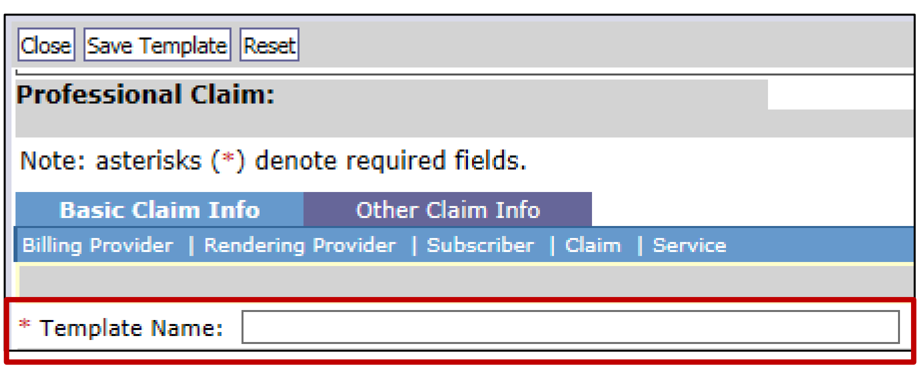
The ProviderOne system allows a provider to create and save Direct Data Entry (DDE) claim templates. Templates are pre-designed claims that can be customized for a particular service or item supplied monthly to a client, to bill a special service code, or to create template batches for Nursing Home clients. Templates can be used for claim entry with standard information already completed, or be used over and over so that each claim does not have to be created from scratch. There is no limit to the number of templates that can be created. You can submit single claims or batches of claims from saved claim templates. (For more information on using templates for Nursing Home claims, click here for the webinar.)

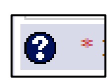
Create a Template

- Log into ProviderOne using the Claims Submitter or Super User profile and choose "**Manage Templates**."
- At the Create Claim Template screen, pick the template type and click the "**Add**" button. If there are no templates created for your domain, you will see "No Records Found" in red.

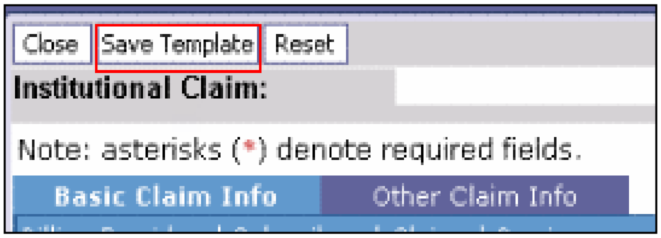


- ProviderOne loads the DDE screen of the template type selected. Choose a **Template Name** and answer **all questions marked with a question mark and a red asterisk**. This is the minimum data required to save a template.



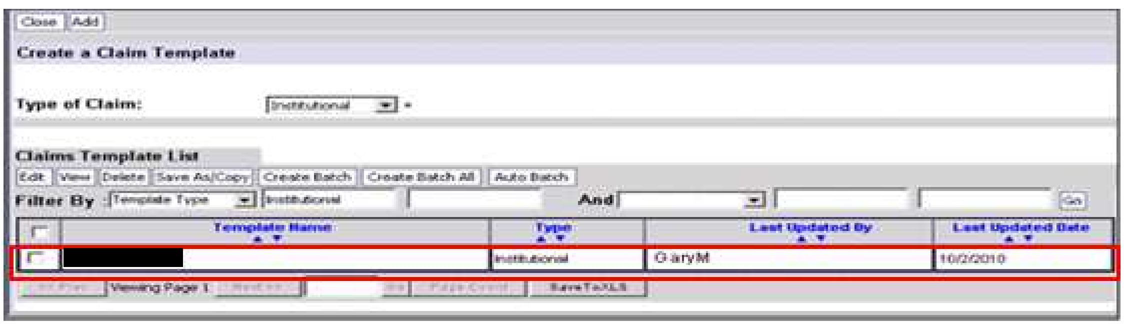


- Providers can add as much or as little information necessary, as long as the template name and all required questions are answered. Once the template is complete, click on the “**Save Template**” button.



- A pop-up window will appear with a question:

- After clicking the OK button, ProviderOne returns to the Claim Template screen adding the template to the list.

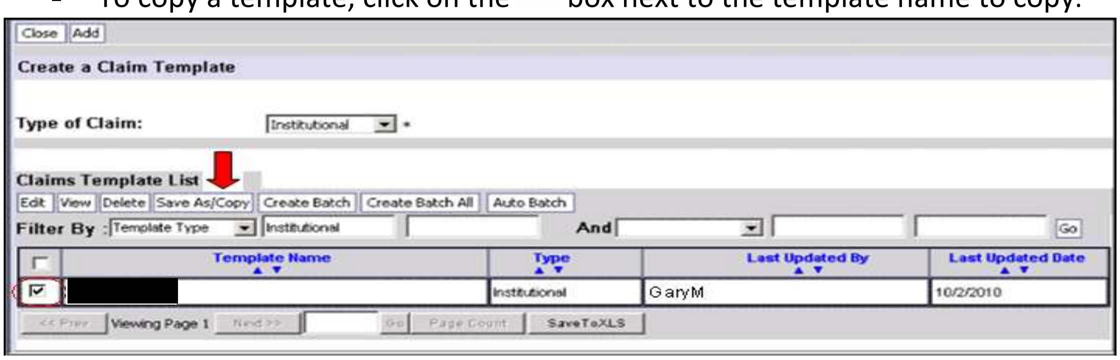


Add as many templates as needed

- Create new ones using the above method or
- Copy a saved template then edit it

Copy a Template

- To copy a template, click on the ☑ box next to the template name to copy.



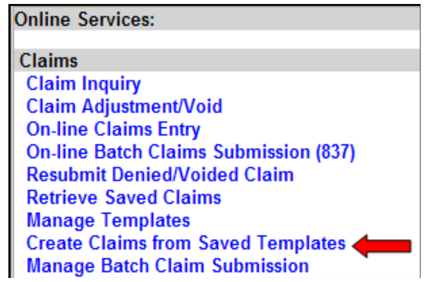
- Then click on the **Save As/Copy** button

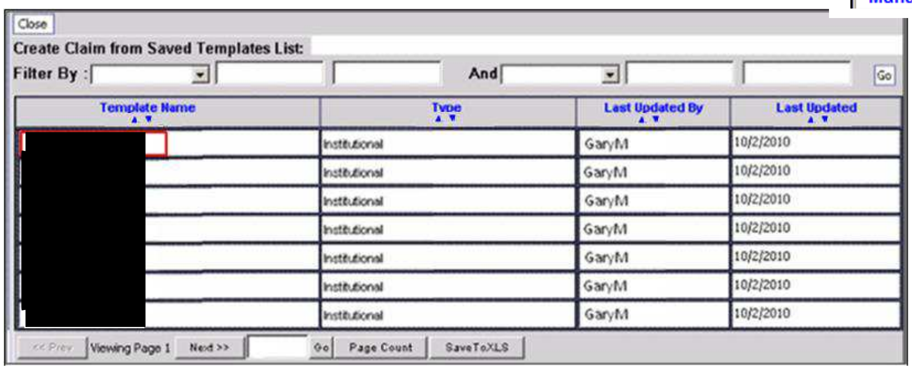
- The system now displays the DDE screen with the template information except the template name. Name this template and change any data as needed then save the template. Build as many templates as required using this method.

Use the Edit feature to make changes to any template. Delete templates no longer needed to keep the template list manageable.

Submit a Claim using a Template

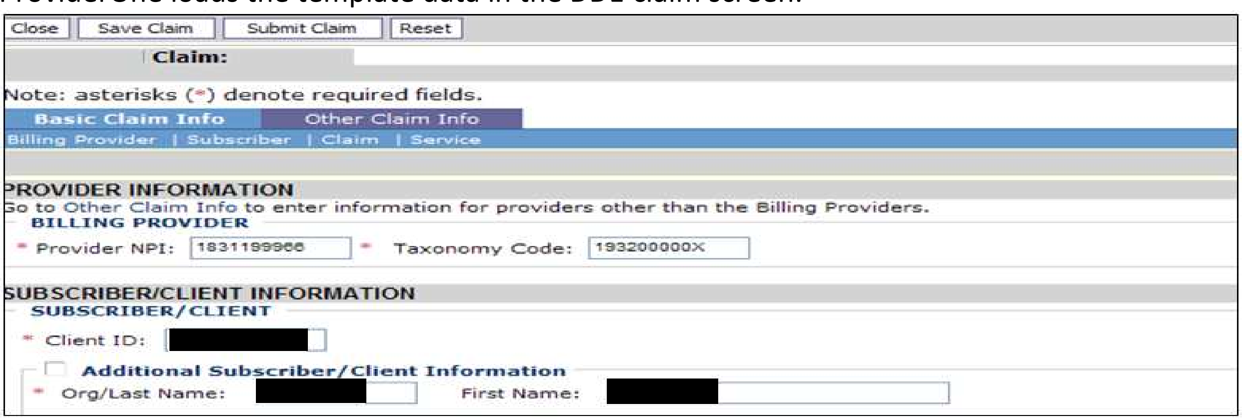
Log into ProviderOne using the Claims Submitter or Super User profile and at the provider portal click on "**Create Claims from Saved Templates.**"





Click on the template name to create a claim

ProviderOne loads the template data in the DDE claim screen.

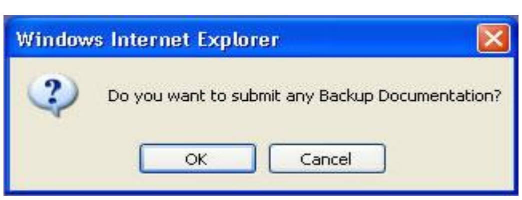


Finish filling in all the claim data.

- Once completed the claim can be saved or
- Submit the claim to ProviderOne

To submit the claim:

- Click on the Submit Claim button
- ProviderOne should then display the BU prompt



- Click OK to submit back up or
- Click cancel for no BU (we are not sending BU)

The next Claim Detail screen shows the claim data.

It is <u>required</u> to click the **OK** button to send the claim!!

References

See the Provider Training web site for links to recorded Webinars, E-Learning, and Manuals http://www.hca.wa.gov/medicaid/provider/Pages/training.aspx

Questions

What are templates?	Templates are pre-designed electronic claims that a provider can customize by entering standard information for a particular service, client, or group of clients. The template can then be used as a starting point for claim entry with the standard information already filled in. There is no limit to the number of templates providers can create.
Why would I use templates?	If you regularly bill similar services for similar clients, it may benefit you to use templates so that some of the standard information you would have to enter on every claim is prefilled in for you.
How do I access the template/submit batch features?	In the provider portal, the features are accessed through these menus: • **Manage Templates** – Use this option to create, edit, and manage templates. • **Create Claims from Saved Templates** – Use this option to start a new claim from a saved template. • **Manage Batch Claim Submission** – Use this option to submit a batch of claims created from saved templates. Using a combination of date ranges and checkboxes, the saved templates selected by a provider will be batched together and submitted as claims for processing in ProviderOne. • **<u>Institutional</u> batch claims process -** Makes it easier to submit batches of Institutional claim types, based on <u>admit</u> and <u>discharge</u> dates. This feature is designed especially for Nursing Homes but may be useful for other institutional providers. **NOTE** – This enhancement will only be available for Institutional claims. It will not be possible to use admit/discharge dates on Professional and Dental claims
How do I use the template/submit batch features?	Providers are encouraged to begin using the template and batch features in a gradual manner, beginning with just a few claims at first while learning the process. For instructions on how to use the features, we

suggest that you minimally review the [E-Learning modules](#) for your claim type on:

- Manage Claim Templates (*about 18 minutes*)
- Create a Claim for a Saved Claim Template (*about 4 minutes*)
- Managing Batch Claim Submission (*about 13 minutes*)

Who can use templates?	Any provider billing through the direct entry screens in ProviderOne can use the template features.
What if I have questions?	Providers with questions about templates should first review the template training materials, and frequently asked questions on the Medicaid Provider website http://www.hca.wa.gov/medicaid/provider/Pages/index.aspx If those materials do not suffice, the providers should submit a question through https://fortress.wa.gov/dshs/p1contactus/. In the "Select Topic" drop-down on the form, please select Create Template/Batch.