



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 <u>here</u> for the webinar.)

Create a Template

- Log into ProviderOne using the Claims Submitter or Super User profile and choose "Manage Templates."
- Provider Portal: Online Services: Claims Hide/Max Claim Inquiry Claim Adjustment/Void On-line Claims Entry On-line Batch Claims Submission (82) Resubmit Denied/Voided Claim Retrieve Saved Claims Manage Templates Create Claims from Saved Templates Manage Batch Claim Submission
- 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.

Close Add				
Create a Claim T	emplate			
Type Of Claim	Institutional	×*		
Claims Template I	.IST veAs/Copy Create Batch Create Batch	All Auto Estab		
ilter By :		And	~	Go
		ite Name ▼	Туре	Last Updated By
			- In a set in a set i	No Records Found !

• 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.

Close Save Template Reset			8
Professional Claim:			
Note: asterisks (*) deno	ote required fields.		
Basic Claim Info	Other Claim Info		
Billing Provider Rendering	Provider Subscriber Claim Serv	ice	
* Template Name:			

• 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.

Close	Save Template	Reset			
Institu	tional Claim	:			
Note:	asterisks (*)) deno	te requ	ired fields.	
Ba	sic Claim Inf	0	Other	Claim Info	

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

Windows	Internet	Explorer	×
?	Do you v	want to save the Tem	plate?
E	ок	Cancel	

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

Al Acto Batch		
And	3	60
Date:	Lest Updated By	Last Updated Date
Institutional	GaryM	10/2/2010
	Tanta Tanta	And I Lest Updated By

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 F box next to the template name to copy.

Close Add						
Create a Claim Template						
Type of Claim:	Institutional	••				
Claims Template List 👢						
Edit View Delete Save As/Copy	And and a second s	Create Batch All	Auto Batch		-	
Filter By : Template Type	Institutional		A	nd	I	Go
	late Name		Туре		Last Updated By	Last Updated Date
			Institutional	Garyl	1	10/2/2010
Viewing Page 1 New	>>	Go Page C	saveT	XLS		

• 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.**"

Online Services:
Claims
Claim Inquiry
Claim Adjustment/Void
On-line Claims Entry
On-line Batch Claims Submission (837)
Resubmit Denied/Voided Claim
Retrieve Saved Claims
Manage Templates
Create Claims from Saved Templates
Manage Batch Claim Submission

Filter By :		And	•	6
Template	: Name	Type	Last Updated By	Last Updated
		Institutional	GaryM	10/2/2010
	100	Institutional	GaryM	10/2/2010
		Institutional	GaryM	10/2/2010
		Institutional	GaryM	10/2/2010
		Institutional	GaryM	10/2/2010
		Institutional	GaryM	10/2/2010
		Institutional	GaryM	10/2/2010

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:

Close

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

Window	vs Internet Explorer	
2	Do you want to submit any Backup	Documentation?
	OK Cancel)

- 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.

Submitted Institu	itional Claim Details							
	Provider NPI: 55 Client ID:	/2009 0:0:0-9/112009 0:	0:0					
Please click "Ad	ld Attachment" button	, to attach the docum	ents.			Ad	id Attachmer	nt
Attachment List:								
	File Name	Attachment Type	Transmission Code	Attachment	File Size	Delete	Uploaded	On
		No Reco	rds Found !					_
					Print	Print Co	over Page	Ok
		IG: You mus the claims			uttor	n to		1

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 <u>http://www.hca.wa.gov/medicaid/provider/Pages/training.aspx</u> 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. Institutional 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 <u>E-Learning modules</u> 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 <u>http://www.hca.wa.gov/medicaid/provider/Pages/index.aspx</u> If those materials do not suffice, the providers should submit a question through <u>https://fortress.wa.gov/dshs/p1contactus/</u> . In the "Select Topic" drop-down on the form, please select Create Template/Batch.