

## Preparing A Claim for Billing

Prior to submitting a patient agreement to billing, it's recommended to review claims for any outstanding requirements. Follow the steps below to **Prepare a Claim**:

On the main dashboard, navigate to the Clinical tab and select Patient Agreements from the drop-down menu.

Once on the Patient Agreements page, search for incomplete PAs by utilizing the filters

Details	Actions
Patient, Test Incomplete Incomplete Older Than 45 Days Not Started In Progress Missing Products Missing Diagnoses Missing Payment Methods Unsigned By Provider Unsigned By Patient Awaiting Fulfillment	<input checked="" type="checkbox"/> 1/1  Incomplete Not Submitted ID 107470 MRN DOB 1995-06-13
Patient, Test Incomplete Incomplete Older Than 45 Days Not Started In Progress Missing Products Missing Diagnoses Missing Payment Methods Unsigned By Provider Unsigned By Patient Awaiting Fulfillment	<input checked="" type="checkbox"/> 0/0  Incomplete Not Submitted ID 107469 MRN DOB 1995-06-13
Patient, Test Incomplete Incomplete Older Than 45 Days Not Started In Progress Missing Products Missing Diagnoses Missing Payment Methods Unsigned By Provider Unsigned By Patient Awaiting Fulfillment	<input checked="" type="checkbox"/> 0/0  Incomplete Not Submitted ID 107468 MRN DOB 1995-06-13
Patient, Test Incomplete Incomplete Older Than 45 Days Not Started In Progress Missing Products Missing Diagnoses Missing Payment Methods Unsigned By Provider Unsigned By Patient Awaiting Fulfillment	<input checked="" type="checkbox"/> 0/1  Incomplete Not Submitted ID 107467 MRN DOB 1995-06-13

Review each patient agreement for required criteria by either selecting Expand All or the downward arrow.

By clicking Expand All, you can view details for every PA listed on the page.

By clicking on the downward arrow, you will only see details for that specific PA.

## Preparing A Claim for Billing

In the Expanded PA, the details below will be visible:

A section that is highlighted orange, indicates the patient agreement is missing required criteria.

- In Example #1 above, the patient agreement is missing ICD-10 code
- In Example #2 above, the patient agreement is missing the payment method
- In Example #3 above, the patient agreement is missing the patient and provider signature

To add missing ICD-10 codes onto PA's utilize the Missing ICD-10 tab. All PA's without an ICD-10 code will be listed. To add the code, type the name or code and select update PA.

## Preparing A Claim for Billing

Once all required criteria if fulfilled, the billing status will turn from orange to green on the patient agreement. The PA will now be visible on the Billing Submissions tab ready for billing under the Not Submitted filter.

Patient Agreements New Patient Agreement

Patient Agreements   Needs Follow Up   **Billing Submission**   Missing ICD-10

Filter by Clear Filters   Displaying patient agreements 1 - 10 of 22 in total   Sort by: Newest to Oldest

Search... Clear

1 2 3 > >>

Not Submitted Ready for Billing Not Submitted

All Clinics All Clinics

All Providers All Providers

All Creators All Creators

All Payment Types All Payment Types

All Categories All Categories

All Dates All Dates

All Billing Channels All Billing Channels

All Additional Filters All Additional Filters

Search Presets Search Presets

Save the current filters to a preset or edit the active preset below

**Ting, Test**  
CSA Orthopedics (Main)  
11/01/2024 by Nicole Valentin 1

1/1 ✉ Ready for Billing Not Submitted

**Diagnoses** S93.3

**Products** OfficeCare Not Submitted

X-Act ROM Knee Brace  
11-2151-9 - Knee - Body Side Left - L1833

**Payment** Medicare (Commercial, Policy Number: P9905517301)

**Attachments** VeriPro\_Coverages\_53000202 (VeriPro Coverages),

**Signatures** ✓ Signed by Self, Test Ting on 11/22/2024  
 ✓ Signed by Doctor Abductor on 11/22/2024

Actions Print

ID 115723  
MRN  
DOB 2018-03-03

Birthdate 2018-03-03  
Email No email has been added.  
Provider Doctor Abductor

Utilize the Reference Guide below for additional information on the Patient Agreement Icons:

	Grey Envelope - Patient Email has been provided, but the Patient Agreement has not been emailed.
	Red Envelope - Patient Email has not been provided.
	Green Envelope- Patient Agreement has been emailed
0/1	Grey Check - Product has not been fulfilled as it is missing required information within the product section. The right sided number in "0/1" shows the total number of products
2/2	Green Check - All products on the order(s) have been fulfilled.
3	Comment Icon - Number of Notes made on the Patient Agreement
1	Paper Clip - Number of attachments uploaded on to the Patient Agreement