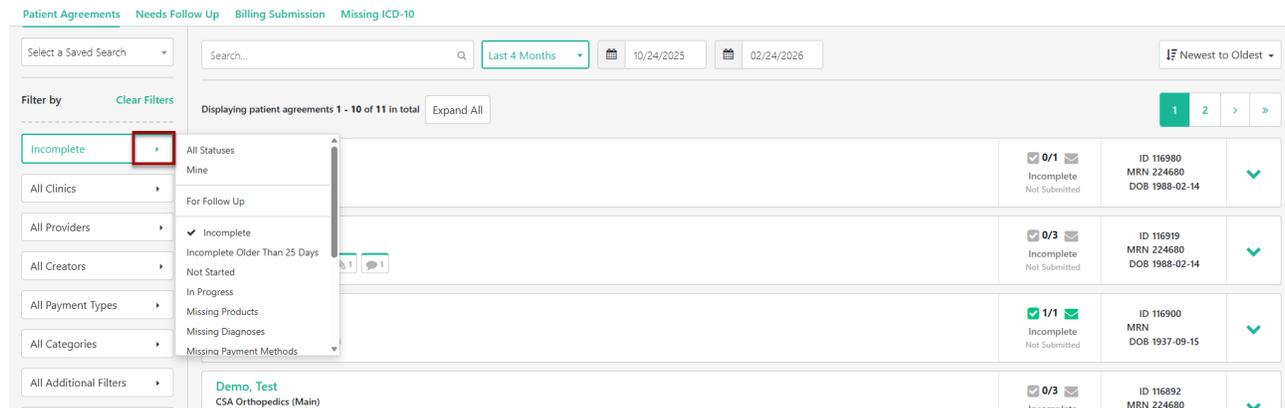# Preparing A Claim for Billing

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.
Note: The PA filter is automatically defaulted to the Last 4 Months.

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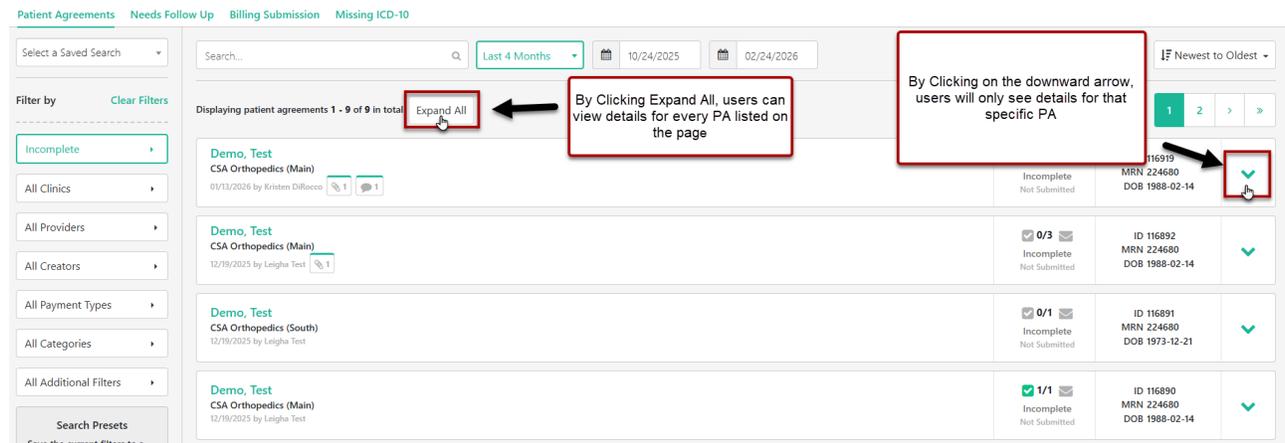
Preparing A Claim for Billing

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.

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

Preparing A Claim for Billing

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