

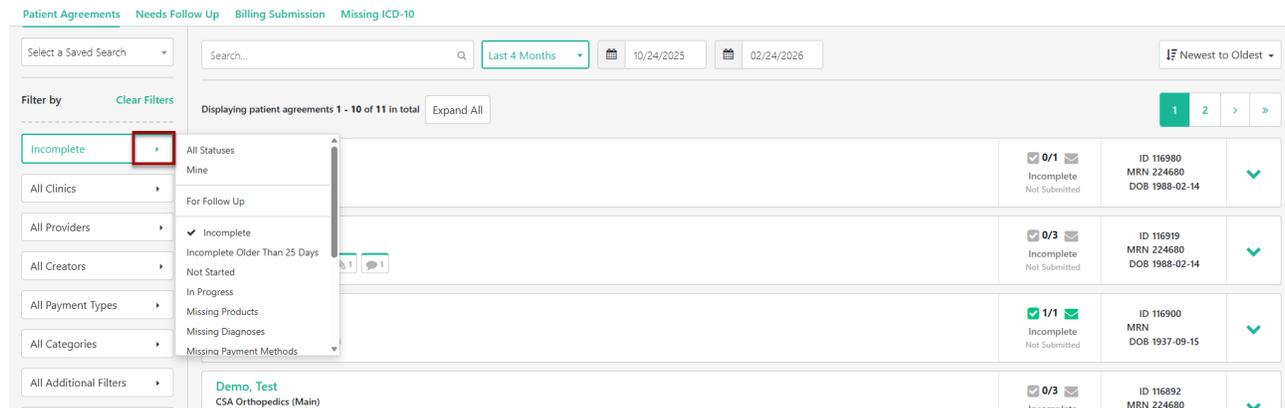
Preparing A Claim for Billing

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**:

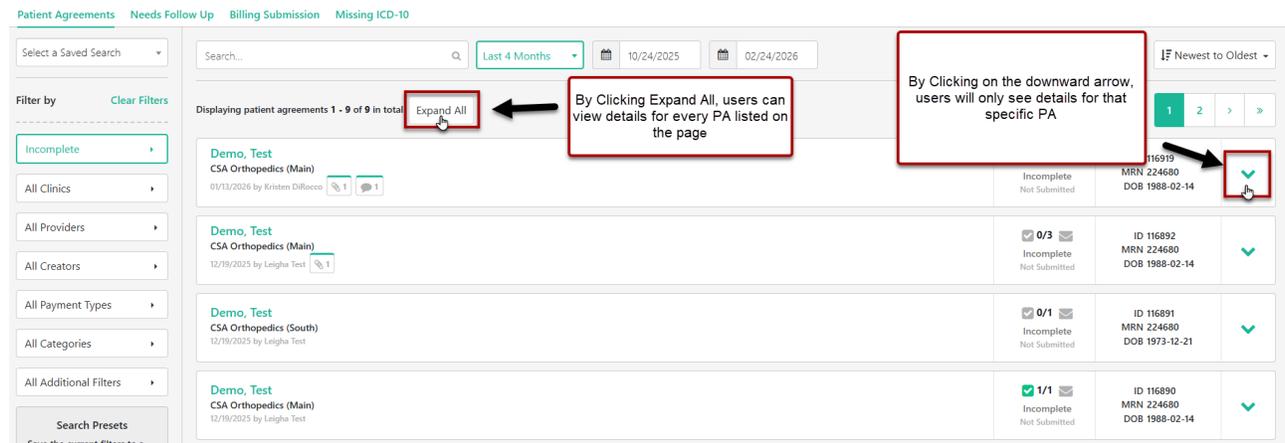
On the main dashboard, navigate to the Clinical tab and select Patient Agreements from the drop-down menu.



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.



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In the Expanded PA, the details below will be visible. A section that is highlighted orange, indicates the patient agreement is missing required criteria.

The screenshot shows the 'Expanded PA' interface for 'Patient, Test' at 'CSA Orthopedics (South)'. The status is '0/1 Incomplete Not Submitted'. The interface is divided into sections: Diagnoses (No diagnoses codes have been added), Products (OfficeCare, AirSelect Standard), Payment (No payment methods have been added), and Signatures (No Signatures have been added). A red box highlights the patient name 'Patient, Test' with an arrow pointing to it and the text 'Click on patient's name to edit'. Another red box highlights the '0/1 Incomplete Not Submitted' status. The right sidebar shows patient details: ID 107500, MRN 123456, DOB 1995-06-13, Birthdate 1995-06-13, Email testemail@gmail.com, and Provider Don Joy.

- 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.

The screenshot shows the 'Missing ICD-10' tab selected. The interface displays a search bar, filters, and a list of patient agreements. One agreement for 'Patient, Test' is shown with details: CSA Orthopedics (Main) - Doctor Abductor, 02/04/2026 by Nicole Kato, and Crutches 88-07300001514/Side Right. A red box highlights the 'S93.01XA x' code entry field. Another red box highlights the 'Update PA' button.

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.

The screenshot shows the 'Billing Submission' tab selected. The 'Not Submitted' filter is active. The interface displays one patient agreement for 'Patient, Test' at 'CSA Orthopedics (Main)'. The status is now '1/1 Ready for Billing Not Submitted'. The interface shows 'Billing Actions 0 Selected', 'Update Channel', and 'Submit to Billing' buttons. The agreement details include: Diagnoses S93.01XA, Products OfficeCare (Paid Crutches), Payment BCBS (Commercial) Self Pay (Self Pay), and Signatures signed by Patient and Doctor Abductor on 02/10/2026. The right sidebar shows patient details: ID 116965, MRN 123456, DOB 1955-05-23, Birthdate 1955-05-23, Email test@gmail.com, and Provider Doctor Abductor.

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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
	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
	Green Check - All products on the order(s) have been fulfilled.
	Comment Icon - Number of Notes made on the Patient Agreement
	Paper Clip - Number of attachments uploaded on to the Patient Agreement