

The “Create & Submit Batch (Template)” How To provides instructions on:

- Create Batch 2
- Submit Batch 12
- Revalidate Batch 19

A Batch (template) is a group of claims which **share the same date of service**. The Batch allows the provider to create a group (batch) of templates, change the date of service on all the templates at one time, and submit the batch all at once.

The process has two steps:

1. Create the batch
2. Submit the batch

This section is on how to create a batch of templates.

1. From the [Provider Portal](#)
2. **Click on** Manage Template

1 Provider Portal



The screenshot displays the Provider Portal interface. A blue arrow points from the 'Manage Templates' option in the 'Claims' menu to a magnified view of the menu. In this magnified view, 'Manage Templates' is highlighted with a red box, and a red arrow points to it with the text '2 Click on'. The main interface shows the 'Claims' menu with the following options: Claims Inquiry, Claim Adjustment/Void, On-line Claims Entry, On-line Batch Claims Submission (837), Resubmit Denied/Void Claim, Retrieve Saved Claims, Manage Templates, Create Claims from Saved Templates, and Manage Batch Claim Submission. The 'Manage Alerts' section is also visible, showing a 'No Records Found!' message.

3. The Create Claim Template page appears
4. The list includes all the templates you have created for your domain
 - a. Type of Claim is Professional. If is not showing, use the drop down menu to select Professional

3 Create Claim Template

4 →

Template Name	Template Type	Last Updated By	Last Updated
[Redacted]	Professional	CurtiJC	03/31/2013
[Redacted]	Professional	CurtiJC	03/31/2013
[Redacted]	Professional	CurtiJC	03/29/2013
[Redacted]	Professional	JamesM	03/28/2013
[Redacted]	Professional	JamesM	03/28/2013
[Redacted]	Professional	CurtiJC	03/25/2013
[Redacted]	Professional	CurtiJC	04/01/2013

A Batch is a group of templates submitted at the same time which share the same date of service.

Note: To submit a template as part of a batch, the template must be a complete Basic Bill, including the service line.

- Number of units & submitted charges must be for the billing period
- The date of service can be blank or any date not in the future . When you create the Batch it will set the date of service on all the templates.

- To view a template and verify that it is complete, **click on** box next to the desired template name
- Click on** Edit or View. Edit will allow you to change data on the saved template. View only allows you to view data on the saved template

Claim Template List:

Edit View Delete SaveAs/Copy Create Batch Create Batch All

Create Claim Template

6

5

Template Name	Template Type	Last Updated By	Last Updated
[Redacted]	Professional	CurtiJC	03/31/2013
[Redacted]	Professional	CurtiJC	03/31/2013
[Redacted]	Professional	CurtiJC	03/29/2013
[Redacted]	Professional	JamesM	03/28/2013
[Redacted]	Professional	JamesM	03/28/2013
[Redacted]	Professional	CurtiJC	03/25/2013
[Redacted]	Professional	CurtiJC	04/01/2013

7. The saved template appears
8. Verify that the template is complete, including service line
9. Change the template as needed

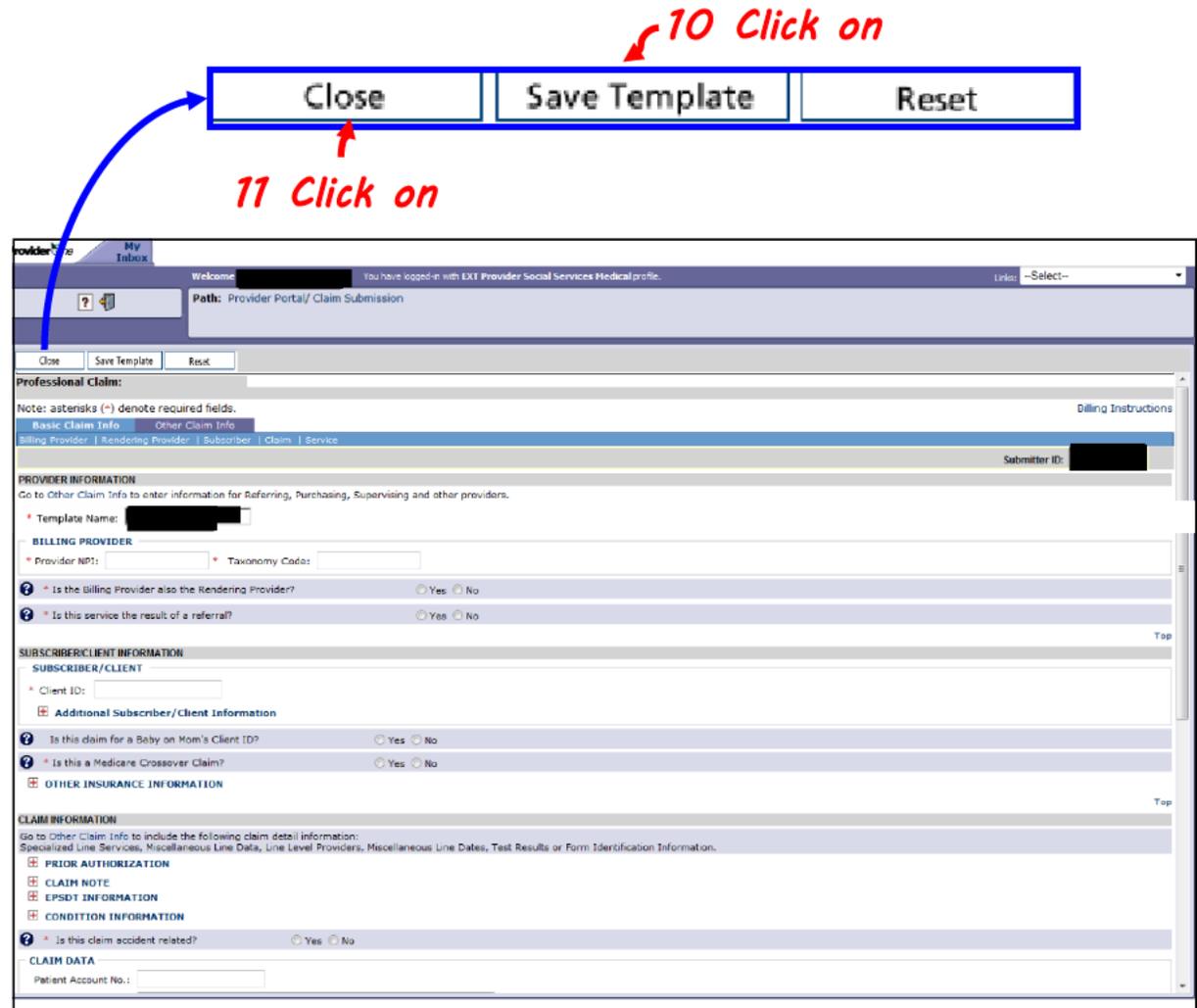
7 Saved Template

Submitted Charge and number of units must be for this billing period.

Line No	Service Dates		Proc. Code	Modifiers				Diagnosis Ptrns				Submitted Charges	Units	PA Number
	From	To		1	2	3	4	1	2	3	4			
1	09/09/2014	09/09/2014	T1002					1				100	1	

10. Click on Save Template

11. Click on Close



Close Save Template Reset

10 Click on

11 Click on

Professional Claim:

Note: asterisks (*) denote required fields. Billing Instructions

Basic Claim Info Other Claim Info

Billing Provider | Rendering Provider | Subscriber | Claim | Service

Submitter ID: [REDACTED]

PROVIDER INFORMATION

Go to Other Claim Info to enter information for Referring, Purchasing, Supervising and other providers.

* Template Name: [REDACTED]

BILLING PROVIDER

* Provider NP: [REDACTED] Taxonomy Code: [REDACTED]

Is the Billing Provider also the Rendering Provider? Yes No

Is this service the result of a referral? Yes No

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID: [REDACTED]

Additional Subscriber/Client Information

Is this claim for a Baby on Mom's Client ID? Yes No

Is this a Medicare Crossover Claim? Yes No

OTHER INSURANCE INFORMATION

CLAIM INFORMATION

Go to Other Claim Info to include the following claim detail information:
Specialized Line Services, Miscellaneous Line Data, Line Level Providers, Miscellaneous Line Dates, Test Results or Form Identification Information.

PRIOR AUTHORIZATION

CLAIM NOTE

EPSDT INFORMATION

CONDITION INFORMATION

Is this claim accident related? Yes No

CLAIM DATA

Patient Account No.: [REDACTED]

12. The Claim Template List appears

13. Last Updated shows that the template was updated

Repeat the process of checking that a template is complete for each of the templates that will be included in the batch.

14. To include all the templates on the list in a batch, Click on Create Batch All

12 Claim Template List

Template Name	Template Type	Last Updated By	Last Updated
[Redacted]	Social Service	JonesK	05/01/2013
[Redacted]	Social Service	CurtiJC	03/31/2013
[Redacted]	Social Service	CurtiJC	03/31/2013
[Redacted]	Social Service	JamesM	03/29/2013
[Redacted]	Social Service	JamesM	03/29/2013
[Redacted]	Social Service	CurtiJC	03/28/2013
[Redacted]	Social Service	CurtiJC	03/25/2013

Claim Template List:
 Edit View Delete SaveAs/Copy Create Batch Create Batch All

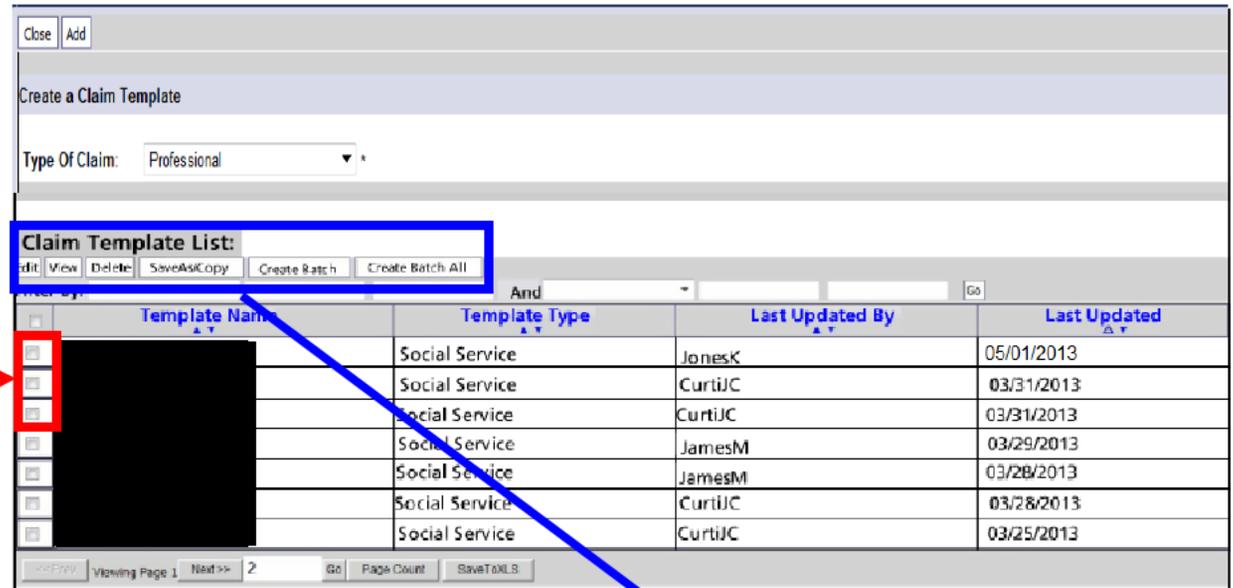
14 Click on

If you have a large number of templates, you can use the filter function to customize the template list so that you can use Batch All.

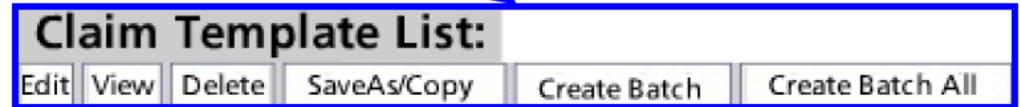
15. To submit selected templates in a batch:

a. Click on box next to the desired template names to include in the batch

b. Click on Create Batch



15a Click on →

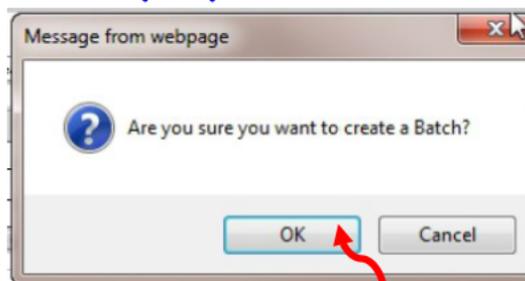


15b Click on ↑

16. Pop-up appears

17. Click on OK

16 Pop-up



17 Click on

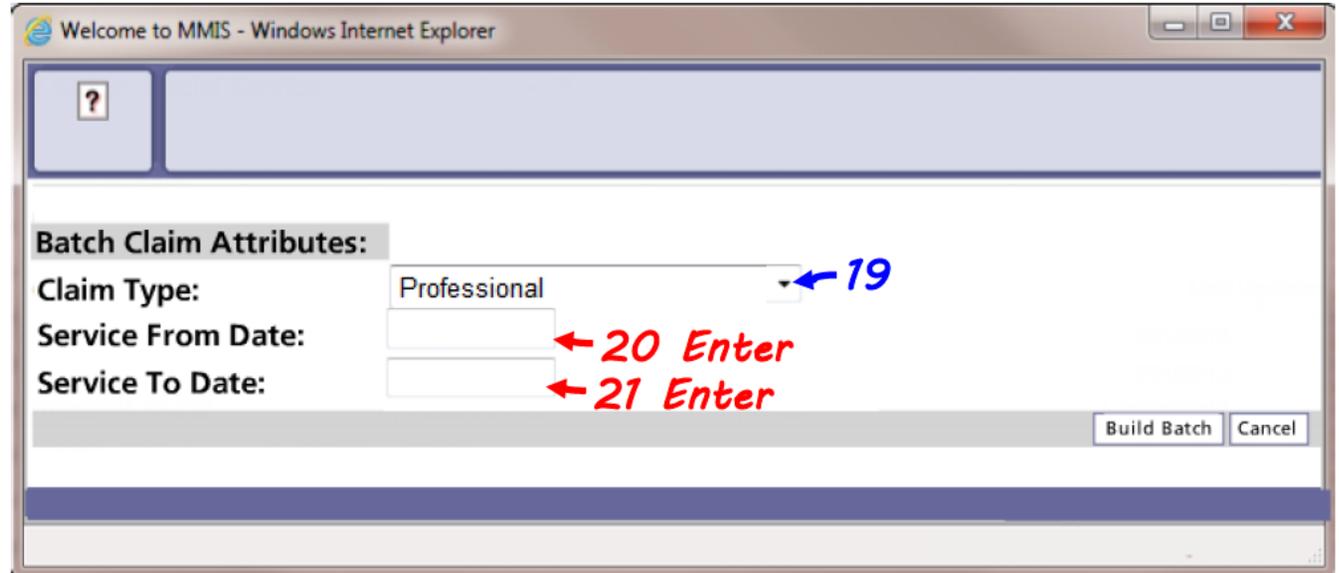
18. Batch Claim Attributes
appears

19. **Select** Professional Claim
Type

20. **Enter** Service From Date

21. **Enter** Service To Date

18 Batch Claim Attributes



Welcome to MMIS - Windows Internet Explorer

Batch Claim Attributes:

Claim Type: Professional ← 19

Service From Date: ← 20 Enter

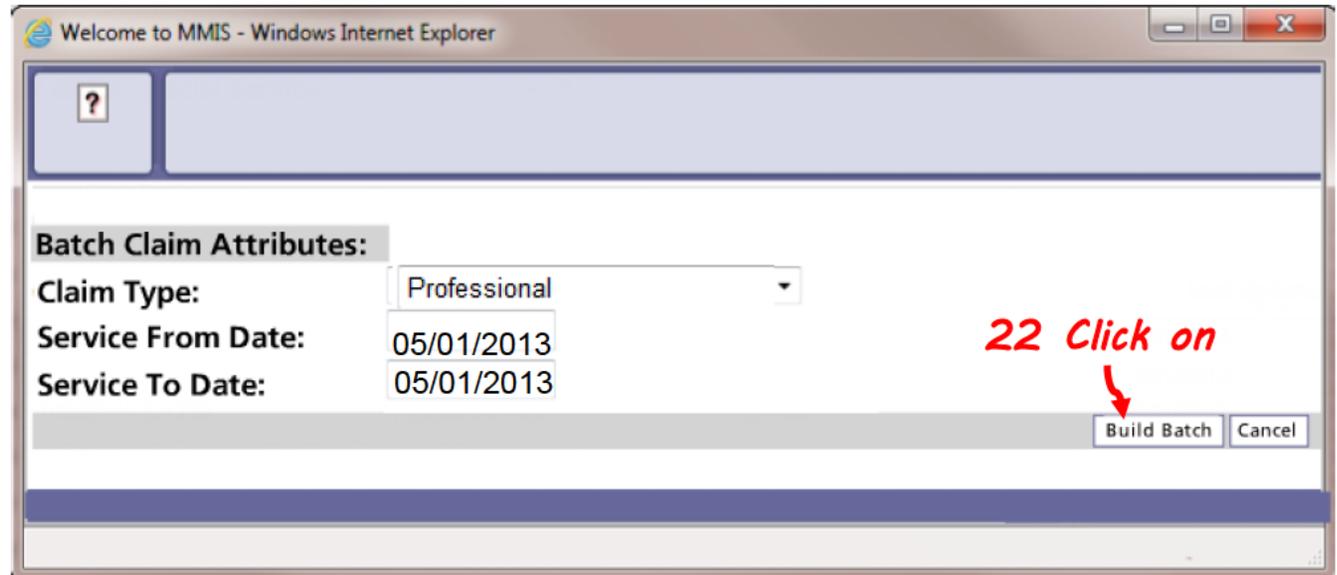
Service To Date: ← 21 Enter

Build Batch Cancel

Service From Date & Service To Date

- The Date of Service will be changed on all the service lines on each template. All claims within the template must be for service provided on the date entered.
- The Date of Service can only be a single day.
- A date range can be used only if: (Few medical service codes are daily or monthly unit types)
 - * All unit types are **daily** or **monthly**
 - * Days are consecutive (worked in a row)
 - * All days are within the same calendar month or include entire months
 - * # of units on templates equals the days or months within the range
 - * All the templates have the same date range

22. Click on Build Batch



Welcome to MMIS - Windows Internet Explorer

Batch Claim Attributes:

Claim Type: Professional

Service From Date: 05/01/2013

Service To Date: 05/01/2013

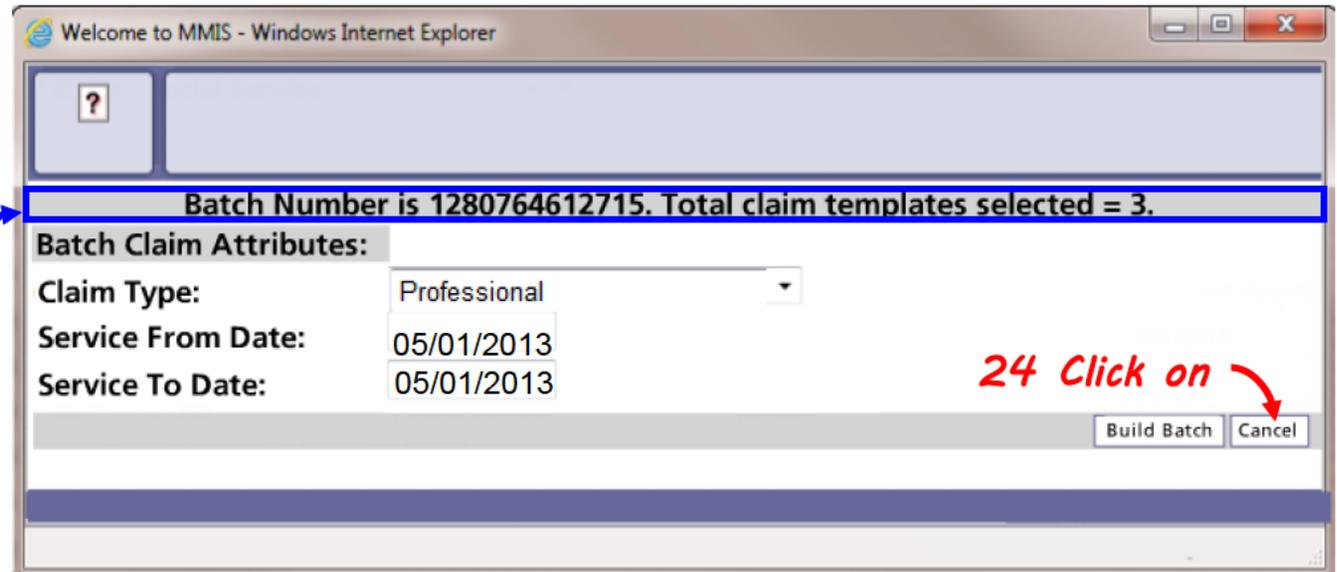
Build Batch Cancel

22 Click on

23. Assigned Batch Number appears along with the number of total claims included in the batch

24. Click on Cancel

23 →



Welcome to MMIS - Windows Internet Explorer

Batch Number is 1280764612715. Total claim templates selected = 3.

Batch Claim Attributes:

Claim Type: Professional

Service From Date: 05/01/2013

Service To Date: 05/01/2013

Build Batch Cancel

24 Click on

Your claim has now been built, but not yet submitted.

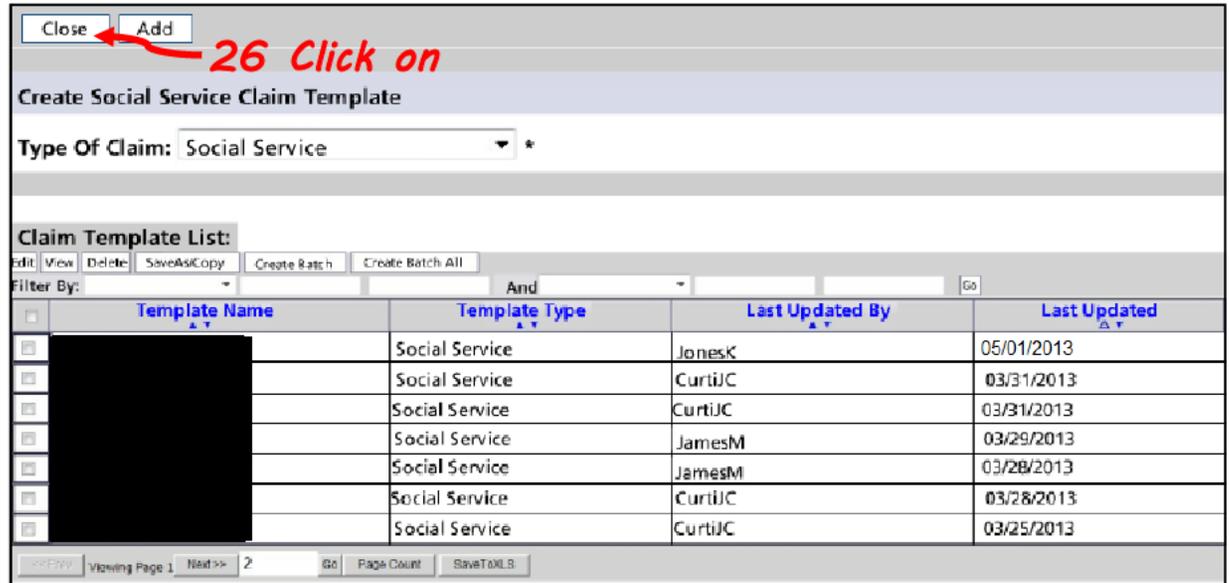
25. The Claim Template List page appears

26. You can repeat the process and create additional batches

or

Click on Close to return to the Provider Portal

25 Claim Template List



Close Add *26 Click on*

Create Social Service Claim Template

Type Of Claim: Social Service *

Claim Template List:

Edit View Delete SaveAsACopy Create Batch Create Batch All

Filter By: And Go

	Template Name	Template Type	Last Updated By	Last Updated
<input type="checkbox"/>		Social Service	JonesK	05/01/2013
<input type="checkbox"/>		Social Service	CurtiJC	03/31/2013
<input type="checkbox"/>		Social Service	CurtiJC	03/31/2013
<input type="checkbox"/>		Social Service	JamesM	03/29/2013
<input type="checkbox"/>		Social Service	JamesM	03/29/2013
<input type="checkbox"/>		Social Service	CurtiJC	03/28/2013
<input type="checkbox"/>		Social Service	CurtiJC	03/25/2013

Viewing Page 1 Next >> 2 Go Page Count SaveToURLS

This section is on how to submit a template batch.

1. From the [Provider Portal](#)
2. **Click on** Manage Batch Claim Submission

1 Provider Portal

The screenshot shows the ProviderOne web application interface. At the top, there is a navigation bar with 'My Inbox' and a welcome message. Below this is a 'Provider Portal' section with a 'Welcome!' message and a brief description of the Department of Social and Health Services (DSHS). The main content area is divided into several sections: 'Online Services', 'Client', 'Payments', 'Managed Care', 'Prior Authorization', 'Provider', 'HIPAA', 'Admin', and 'Social Service Authorizations and Billing'. The 'Claims' section is expanded, showing a list of options including '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', and 'Manage Batch Claim Submission'. The 'Manage Batch Claim Submission' option is highlighted with a red box and a red arrow pointing to it with the text '2 Click on'. A blue arrow points from the 'On-line Batch Claims Submission (837)' link in the 'Claims' menu to the 'Welcome!' message in the top right of the main content area.

3. From the Batch Claim Submission Status List

5 Click on

View Claims

3 Batch Claim Submission Status List

4. Click on box next to the desired batch. A batch must have status of Passed Validation before it can be submitted.

5. Click on View Claims

Batch Number	Type	Created By	Batch Creation Date	Status	From DOS	To DOS	Total Billed Amount	Claim Count	Submitted Claim Count
<input type="checkbox"/> 1280764612715	Social Service	JonesK	04/01/2013	Pass Validation	05/01/2013	05 /31/2013	\$100.00	3	0
<input type="checkbox"/> 1280764613200	Social Service	CurtiJC	04/01/2013	Submitted for Claims Loading	05/01/2013	05/15/2013	\$150.00	4	4
<input type="checkbox"/> 1280764613335	Social Service	CurtiJC	03/28/ 2013	Submitted for Claims Loading	04/01/2013	04/15/2013	\$300.00	2	2
<input type="checkbox"/> 1280764613335	Social Service	CurtiJC	03/15/2013	Submitted for Claims Loading	04/01/2013	04/30/2013	\$215.00	2	2
<input type="checkbox"/> 1280764614895	Social Service	JonesK	02/15/2013	Waiting	03/01/2013	03/30/2013	\$105.00	3	0
<input type="checkbox"/> 1280764614895	Social Service	CurtiJC	02/15/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	\$285.00	2	2
<input type="checkbox"/> 1280764614895	Social Service	CurtiJC	02/01/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	\$100.00	3	3

Batch Number	Type	Created By	Batch Creation Date	Status	From DOS	To DOS	Total Billed Amount	Claim Count	Submitted Claim Count
<input type="checkbox"/> 1280764612715	Social Service	JonesK	04/01/2013	Pass Validation	05/01/2013	05 /31/2013	\$100.00	3	0

4 Click on

Pass Validation

No claims have Been submitted

After a batch is created, ProviderOne checks the batch to ensure the templates are complete bills:

- **Pass Validation** means the all the templates have complete, valid information and the **batch can be submitted**.
- **Failed Validation** means one or more items within the batch is not valid and the **batch cannot be submitted**. See Revalidation section.

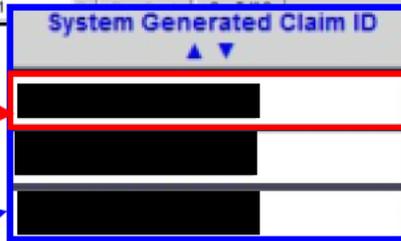
6. Claims Created from Batch List appears
7. Each template is assigned a System Generated Claim ID
8. You can modify a claim prior to submission of the Batch.
 - a. Click on the System Generated Claim ID number
 - b. The template appears
 - c. Modify the template as needed
 - d. Save template

6 Claims created from Batch List

Link	System Generated Claim ID	Template Name	Client ID	Client Name	Authorization Number	From Date Of Service	To Date Of Service
						05/01/2013	05/31/2013
						05/01/2013	05/31/2013
						05/01/2013	05/31/2013

8a Click on →

7 ↗



The System Generated Claim ID is the batch number and saved claim number.

8b-d Professional Claim (Template)

9. You can delete a claim prior to submission of the batch.

Click on box next to the desired batch

<input type="button" value="Close"/> <input type="button" value="Submit Selected"/> <input type="button" value="Submit Entire Batch"/> <input type="button" value="Delete"/>								
Claims created from Batch List								
Filter By : _____ And _____ Go								
<input type="checkbox"/>	Link	System Generated Claim ID	Template Name	Client ID	Client Name	Authorization Number	From Date Of Service	To Date Of Service
<input type="checkbox"/>	▶	██████████	██████████	██████████	██████████	██████████	05/01/2013	05/31/2013
<input type="checkbox"/>	▶	██████████	██████████	██████████	██████████	██████████	05/01/2013	05/31/2013
<input type="checkbox"/>	▶	██████████	██████████	██████████	██████████	██████████	05/01/2013	05/31/2013

10. Click on Delete

9 Click on →

<input type="button" value="Close"/> <input type="button" value="Submit Selected"/> <input type="button" value="Submit Entire Batch"/> <input type="button" value="Delete"/>			
Claims created from Batch List			
Filter By : _____			
<input type="checkbox"/>	Link	System Generated Claim ID	Template Name
<input type="checkbox"/>	▶	██████████	██████████
<input type="checkbox"/>	▶	██████████	██████████
<input type="checkbox"/>	▶	██████████	██████████

10 Click on ↷

You can submit all or some of the listed claims.

11. You select some of the claims, **click on** box next to the desired claims

12. **Click on** Submit Selected

or

11 Click on →

13. To submit all of the listed claims, **click on** Submit Entire Batch

Claims created from Batch List

<input type="checkbox"/>	Link	System Generated Claim ID	Template Name	Client ID	Client Name	Authorization Number	From Date Of Service	To Date Of Service
<input type="checkbox"/>	▶	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	05/01/2013	05/31/2013
<input type="checkbox"/>	▶	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	05/01/2013	05/31/2013
<input type="checkbox"/>	▶	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	05/01/2013	05/31/2013

12 Click on

13 Click on

<input type="checkbox"/>	Link	System Generated Claim ID	Template Name
<input type="checkbox"/>	▶	[REDACTED]	[REDACTED]
<input type="checkbox"/>	▶	[REDACTED]	[REDACTED]
<input type="checkbox"/>	▶	[REDACTED]	[REDACTED]

(A batch can only be used one time.)

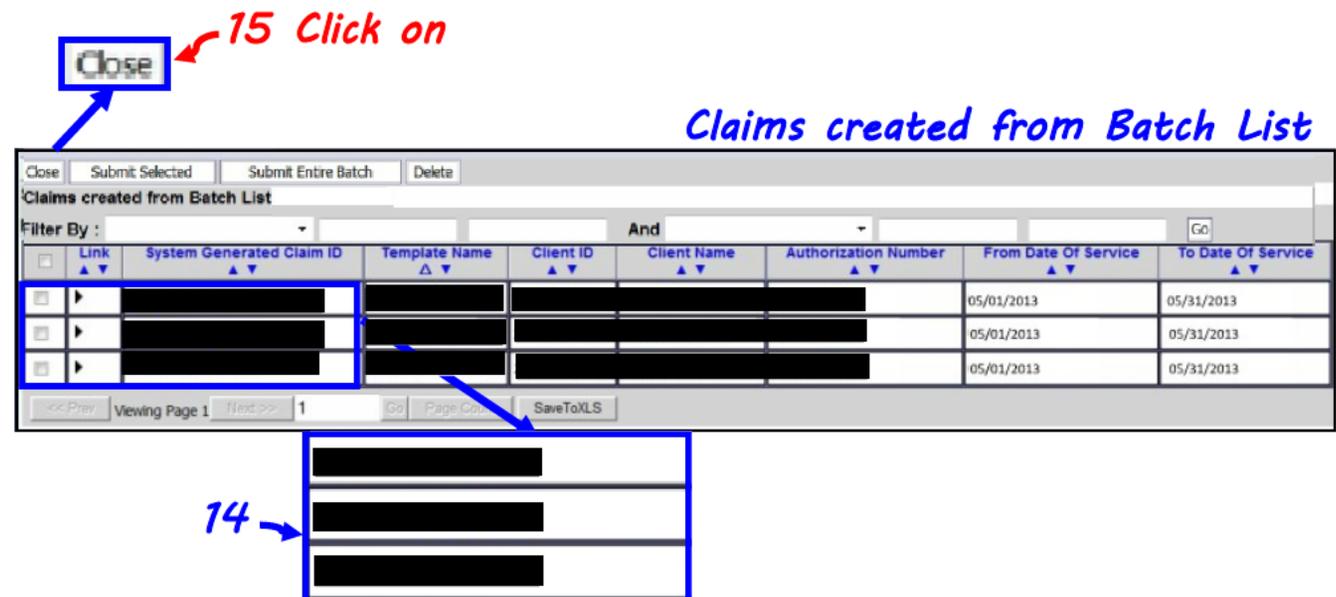
14. After submitting the batch, the System Generated Claim ID is replaced with the Transaction Control Number (TCN)

15. Click on Close

15 Click on

Close

Claims created from Batch List



Link	System Generated Claim ID	Template Name	Client ID	Client Name	Authorization Number	From Date Of Service	To Date Of Service
	[REDACTED]					05/01/2013	05/31/2013
	[REDACTED]					05/01/2013	05/31/2013
	[REDACTED]					05/01/2013	05/31/2013

14

16. Batch Claim Submission Status List appears

16 Batch Claim Submission Status List

19 Click on

17. Showing updated status

18. Showing Submitted Claim Count

19. Click on Close

Batch Claim Submission Status List										
Filter By: [] [] And [] [] Go										
<input type="checkbox"/>	Batch Number	Type	Created By	Batch Creation Date	Status	From DOS	To DOS	Total Billed Amount	Claim Count	Submitted Claim Count
<input checked="" type="checkbox"/>	1280764612715	Social Service	JonesK	04/01/2013	Submitted for Claims Loading	05/01/2013	05/31/2013	\$100.00	3	3
<input type="checkbox"/>	1280764613200	Social Service	CurtiJC	04/01/2013	Submitted for Claims Loading	05/01/2013	05/15/2013	\$150.00	4	4
<input type="checkbox"/>	1280764613335	Social Service	CurtiJC	03/28/2013	Submitted for Claims Loading	04/01/2013	04/15/2013	\$300.00	2	2
<input type="checkbox"/>	1280764613335	Social Service	CurtiJC	03/15/2013	Submitted for Claims Loading	04/01/2013	04/30/2013	\$215.00	2	2
<input type="checkbox"/>	1280764614895	Social Service	JonesK	02/15/2013	Waiting	03/01/2013	03/30/2013	\$105.00	3	0
<input type="checkbox"/>	1280764614895	Social Service	CurtiJC	02/15/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	\$285.00	2	
<input type="checkbox"/>	1280764614895	Social Service	CurtiJC	02/01/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	\$100.00	3	

17

Submitted for Claims Loading

Claim Count	Submitted Claim Count
3	3

18

After a batch is created, ProviderOne checks the batch to ensure the billing data is valid. This section is on how to check the validation of a batch and revalidate a template batch which has Failed Validation.

1. From the [Provider Portal](#)
2. **Click on** Manage Batch Claim Submission

1 Provider Portal

The screenshot shows the ProviderOne Provider Portal interface. The 'Claims' menu is expanded, and 'Manage Batch Claim Submission' is highlighted with a red box. A blue arrow points from the 'On-line Batch Claims Submission (837)' link in the main menu to the expanded 'Claims' menu. A red arrow points to the 'Manage Batch Claim Submission' link with the text '2 Click on'.

3 Batch Claim Submission Status List

3. The Batch Claim Submission Status List appears

After a batch is created, ProviderOne checks the batch to ensure the billing data is valid.

Batch Number	Type	Created By	Batch Creation Date	Status	From DOS	To DOS	Total Billed Amount	Claim Count	Submitted Claim Count
1280764612715	Social Service	JonesK	04/01/2013	Pass Validation	05/01/2013	05/31/2013	\$100.00	3	0
1280764613200	Social Service	CurtiJC	04/01/2013	Submitted for Claims Loading	05/01/2013	05/15/2013	\$150.00	4	4
1280764613335	Social Service	CurtiJC	03/28/2013	Submitted for Claims Loading	04/01/2013	04/15/2013	\$300.00	2	2
1280764613335	Social Service	CurtiJC	03/15/2013	Submitted for Claims Loading	04/01/2013	04/30/2013	\$215.00	2	2
1280764614895	Social Service	JonesK	02/15/2013	Failed Validation	03/01/2013	03/30/2013	\$105.00	3	0
1280764614895	Social Service	CurtiJC	02/15/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	\$285.00	2	2
1280764614895	Social Service	CurtiJC	02/01/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	\$100.00	3	3

4. **Pass Validation** means all the templates have complete, valid information and the batch can be submitted

5. **Failed Validation** means one or more items within the batch is not valid and the batch cannot be submitted

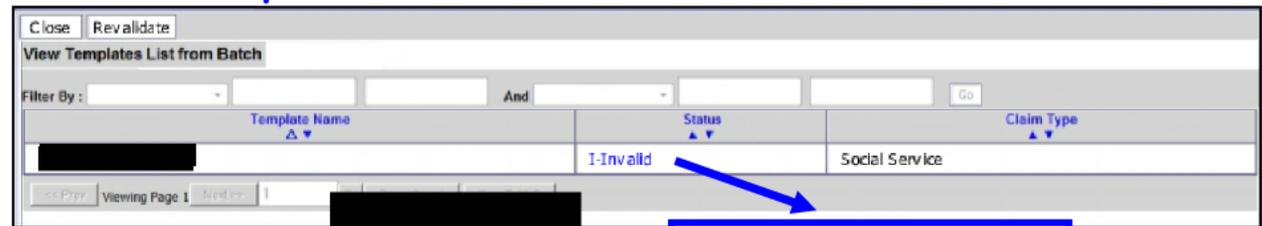
6. To view why a batch failed validation, **click on** the batch number

Batch Number	Status
1280764612715	Pass Validation ← 4
1280764613200	Submitted for Claims Loading
1280764613335	Submitted for Claims Loading
1280764613335	Submitted for Claims Loading
1280764614895	Failed Validation ← 5
1280764614895	Submitted for Claims Loading
1280764614895	Submitted for Claims Loading

6 Click on

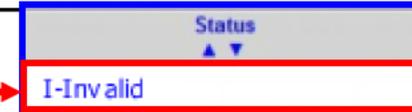
7. The View Template List from Batch appears

7 View Template List from Batch



8. Click on status

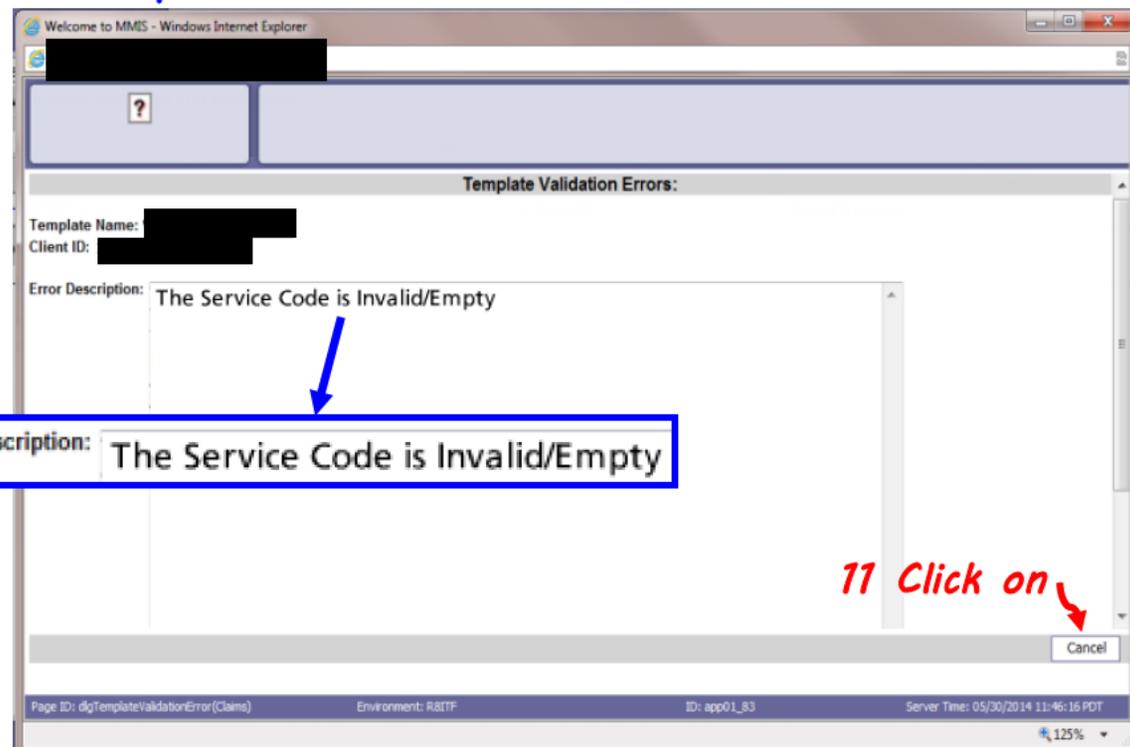
8 Click on →



9. Template Validation Errors appears

9 Template Validation Errors

10. View Error Description (IE “service code is invalid/empty”)



10

Error Description: The Service Code is Invalid/Empty

11 Click on →

11. Click on Close

12. The View Template List from Batch appears

12 View Template List from Batch

13. Click on template name

14. Template appears

15. Find and correct the error then save the template

16. Click on Save

14 Professional Claim (Template)

15 Find and correct error

17. The View Template List from Batch appears

17 View Template List from Batch

18. Click on Revalidate

Close Revalidate *18 Click on*

19. The Batch Claim Submission Status List appears

19 Batch Claim Submission Status List

20. The updated Status is Waiting. It is most likely that the Status will have completed validation and the results will show

Batch Number	Type	Created By	Batch Creation Date	Status	From DOS	To DOS	Total Billed Amount	Claim Count	Submitted Claim Count
1280764612715	Social Service	JonesK	04/01/2013	Pass Validation	05/01/2013	05/31/2013	\$100.00	3	0
1280764613200	Social Service	CurtiJC	04/01/2013	Submitted for Claims Loading	05/01/2013	05/15/2013	\$150.00	4	4
1280764613335	Social Service	CurtiJC	03/28/2013	Submitted for Claims Loading	04/01/2013	04/15/2013	\$300.00	2	2
1280764613335	Social Service	CurtiJC	03/15/2013	Submitted for Claims Loading	04/01/2013	04/30/2013	\$215.00	2	2
1280764614895	Social Service	JonesK	02/15/2013	Waiting	03/01/2013	03/30/2013	\$105.00	3	0
1280764614895	Social Service	CurtiJC	02/15/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	\$285.00	2	2
1280764614895	Social Service	CurtiJC	02/01/2013	Submitted for Claims Loading	03/01/2013	03/15/2013	\$100.00	3	3

20 → Waiting

21 → Pass Validation

21. If the status is Pass Validation, the batch can now be submitted