

The “Create Template & Submit Claim” How To provides instructions on:

- Create Template 2
- Copy Template (Time Saving Tip) 12
- Submit Saved Template 18

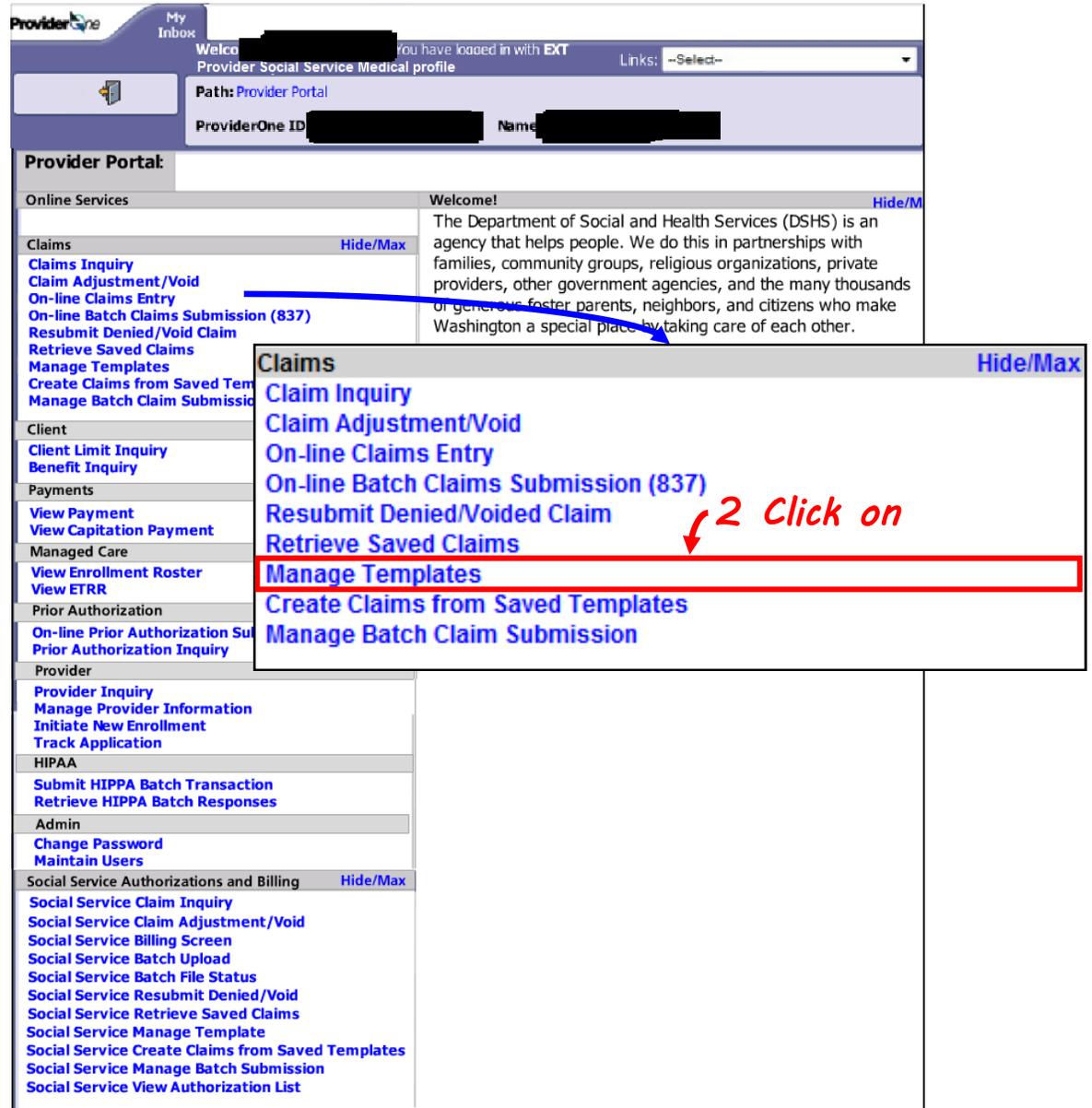
Templates can be used when you have repetitive billing; where the claim is the same, or nearly the same, each time you bill. With a template, you create a billing page that is reusable. Using templates is a two-step process: The first step is to create and save the template. The second step is to use the saved template to submit a claim.

This section is on how to create a saved template.

1. From the [Provider Portal](#)

2. **Click on** Manage Template

1 Provider Portal



The screenshot shows the Provider Portal interface. The 'Claims' menu is expanded, and the 'Manage Templates' option is highlighted with a red box. A red arrow points to this option with the text '2 Click on'. A blue arrow points from the 'On-line Batch Claims Submission (837)' option to the 'Welcome!' message on the right side of the page.

Claims Hide/Max

- 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

2 Click on

3. The Create a Claim Template appears showing all the saved templates (3a) within your domain
4. If you have a lot of templates you can use the filters to find a template
5. You can sort a column using the to read A-Z/1-9 or Z-A/9-1

3 Create a Claim Template

Close Add

Welcome [redacted] You have logged in with EXT
 Provider Social Service Medical profile Links: --Select--

Path: Provider Portal
 ProviderOne ID [redacted] Name [redacted]

Create a Claim Template

Type Of Claim: Professional *

Template Name

Claim Template List:

Filter By: [dropdown] And [dropdown] Go

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

<< Prev Viewing Page 1 Next >> 2 Go Page Count SaveToXLS

Filter By: [dropdown] And [dropdown] Go

- Authorization Number
- Client First Name
- Client ID
- Client Last Name
- From Date of Service
- Last Updated By
- Last Updated Date
- Provider ID
- Service Code
- Template Name
- Template Type
- To Date of Service

- A template is a saved claim and may contain one or more service lines.
- A template is useful when making repetitive claims by reducing the amount of data entry for each claim.

6. The page is used to:
- Edit a saved template
 - View a saved template
 - Delete a template
 - Change template name or copy template
 - Create a batch or group of templates

Create a Claim Template

Claim Template List:

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

Claim Template List:

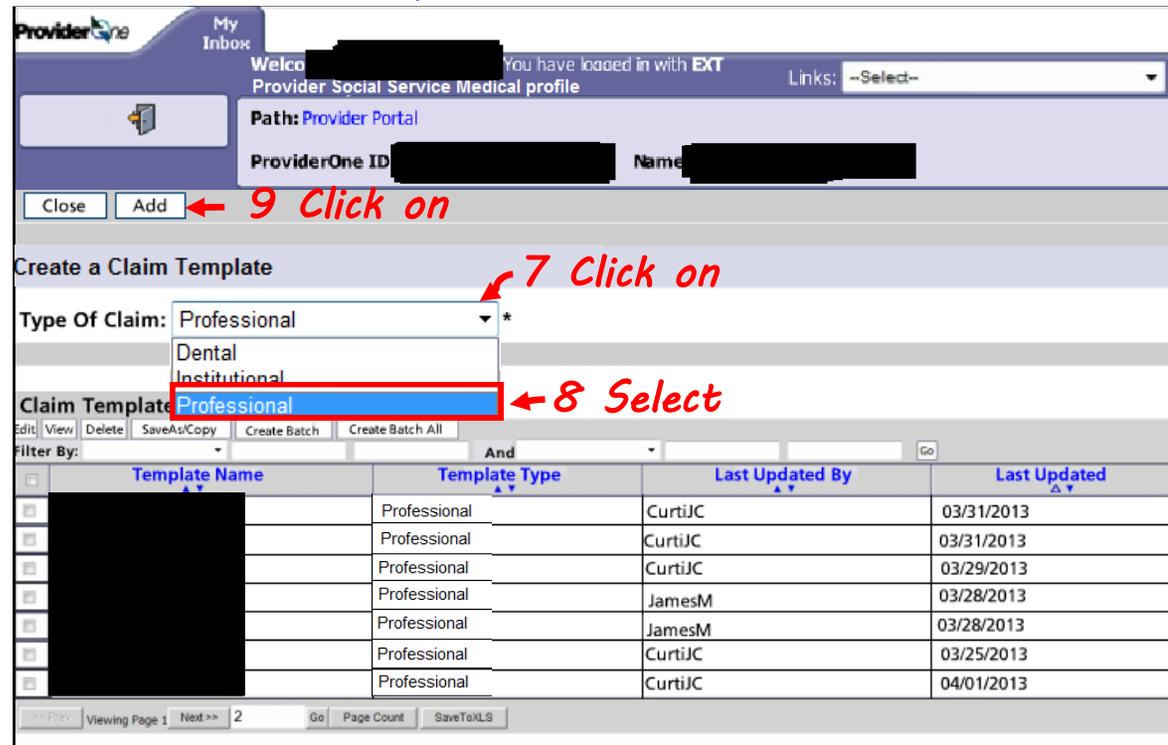
Edit	View	Delete	SaveAs/Copy	Create Batch	Create Batch All
------	------	--------	-------------	--------------	------------------

6a
 6b
 6c
 6d

6e

7. To create a template **click on**  to show menu
8. **Select** Professional
9. To create a new template **click on** Add

Create a Claim Template



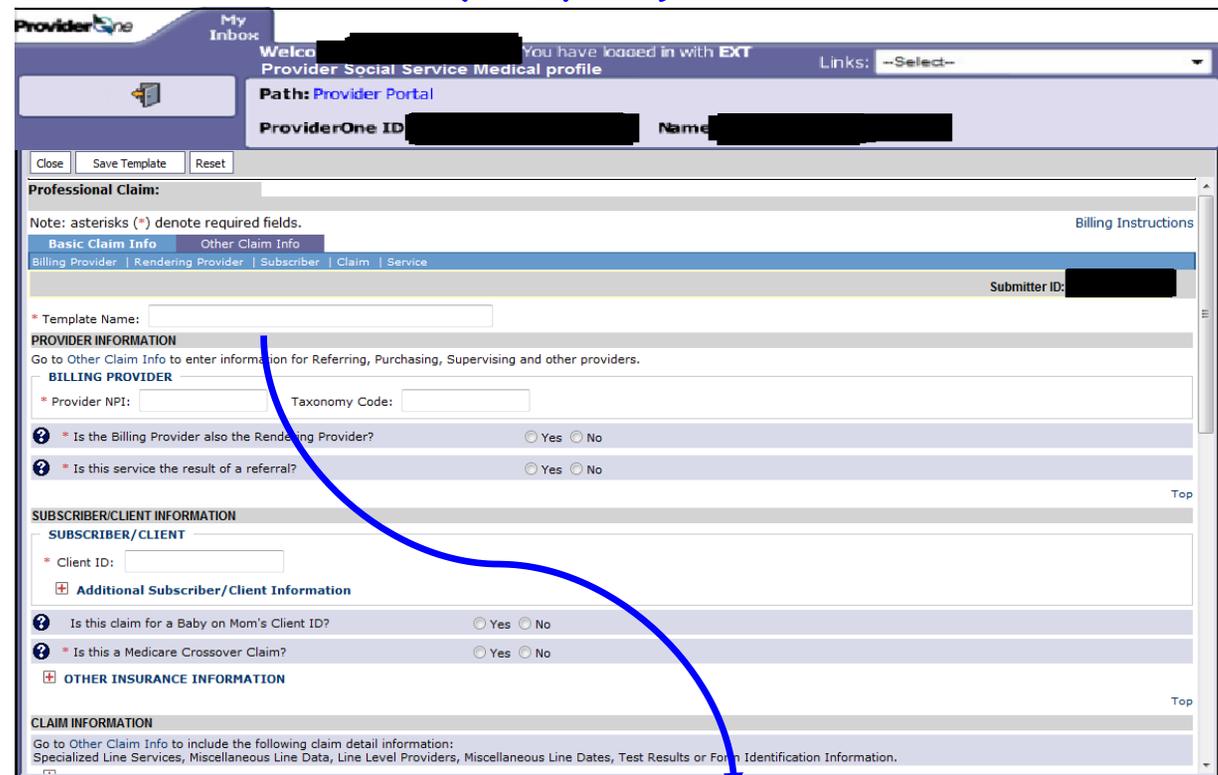
The screenshot shows the 'Create a Claim Template' page in the ProviderOne system. A dropdown menu for 'Type Of Claim' is open, with 'Professional' selected and highlighted in red. A red box highlights the 'Add' button. Red arrows and text annotations indicate the steps: '7 Click on' points to the dropdown arrow, '8 Select' points to the 'Professional' option, and '9 Click on' points to the 'Add' button.

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

10. The Professional Claim screen appears. This page is a Professional Billing page with an added Template Name field
11. Enter a template name (required)

Template Name: You create the name. Use a name that will help you manage your templates. The example uses the clients name "Waters". What you use if up to you.

10 Professional Claim (Template)



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]

* Template Name: [REDACTED]

PROVIDER INFORMATION

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

BILLING PROVIDER

* Provider NPI: [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

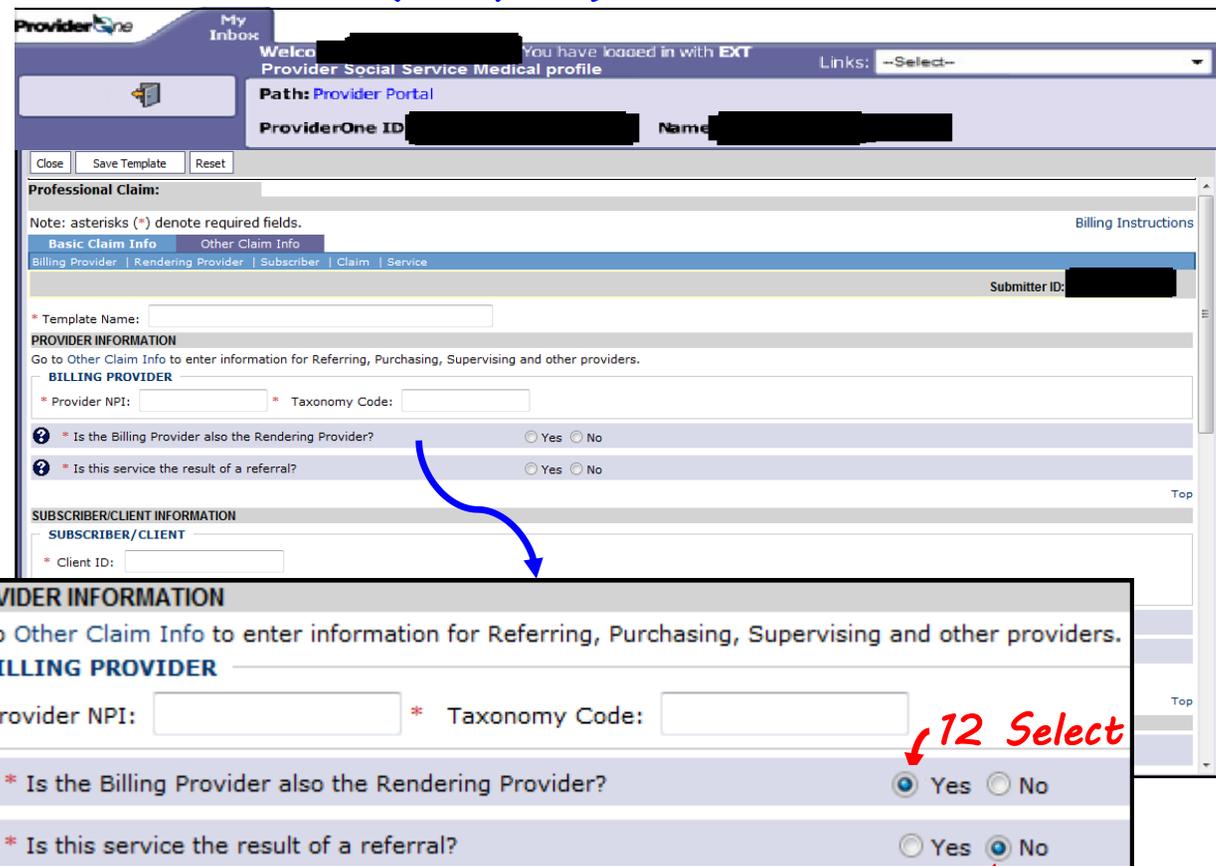
Go to Other Claim Info to include the following claim detail information:
Specialized Line Services, Miscellaneous Line Data, Line Level Providers, Miscellaneous Line Dates, Test Results or Form Identification Information.

* Template Name: [REDACTED]

11 Enter

- 12. **Select** Yes for Rendering Provider (required)
- 13. **Select** No for Referral (required)

Professional Claim (Template)



Professional Claim:

Note: asterisks (*) denote required fields.

Basic Claim Info | Other Claim Info

Billing Provider | Rendering Provider | Subscriber | Claim | Service

Submitter ID: [REDACTED]

* Template Name: [REDACTED]

PROVIDER INFORMATION

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

BILLING PROVIDER

* Provider NPI: [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

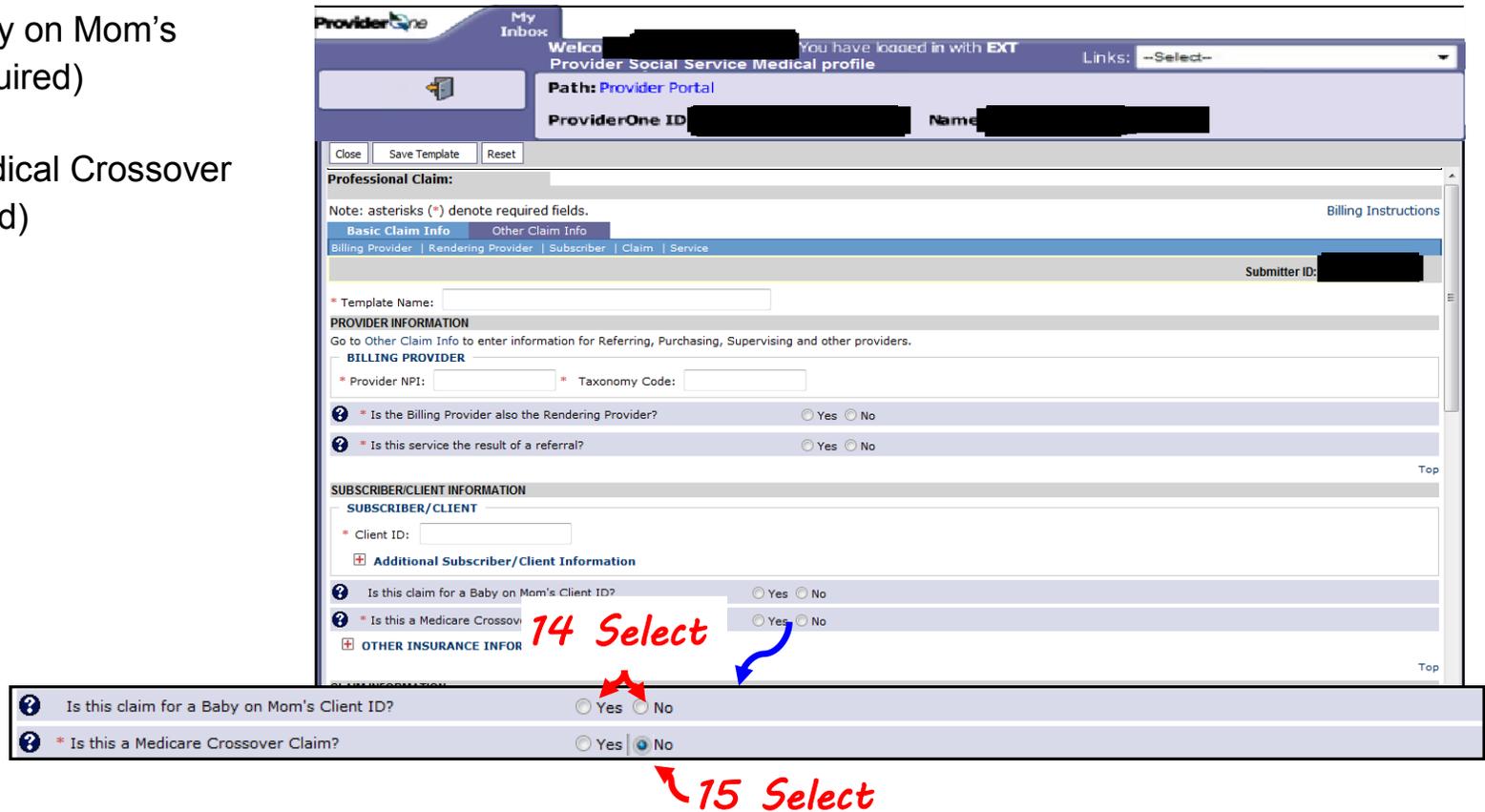
SUBSCRIBER/CLIENT

* Client ID: [REDACTED]

Please note: The following instructions are for creating a template with the minimum number of entries needed to save the template. Most provider will want to add as much information as possible to the template to reduce the amount of data entry at billing. It is recommended that at this point you use the Social Service Medical How To Guide to completely fill in the repetitive claims information in the template then return to this How To starting on page 10.

Professional Claim (Template)

- 14. **Select** for Baby on Mom's Client ID (required)
- 15. **Select** No Medical Crossover Claim (required)



The screenshot shows the 'Professional Claim' form in the ProviderOne system. The form is titled 'Professional Claim' and includes sections for 'Basic Claim Info', 'PROVIDER INFORMATION', and 'SUBSCRIBER/CLIENT INFORMATION'. The 'SUBSCRIBER/CLIENT INFORMATION' section contains the following questions:

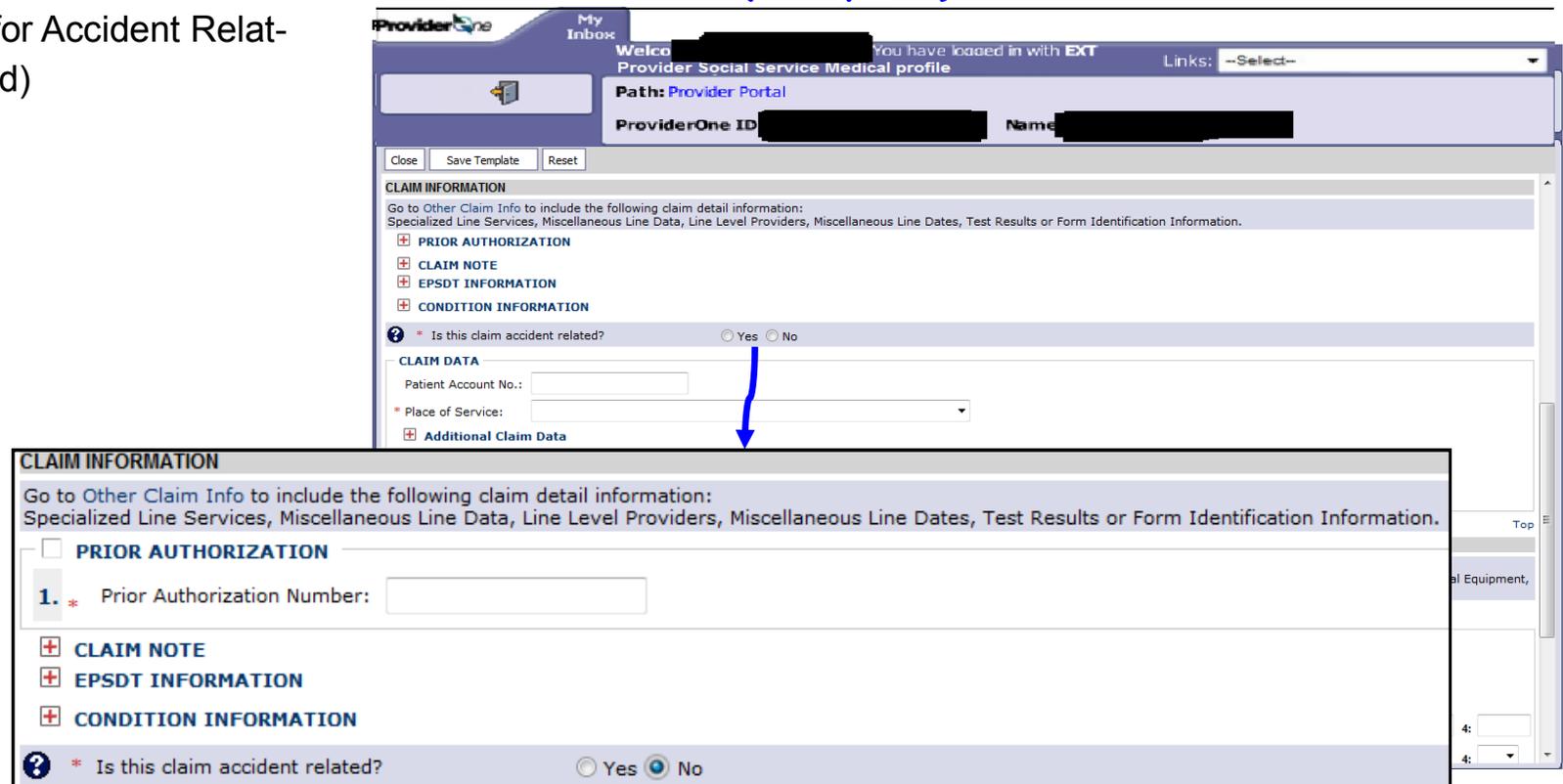
- Is this claim for a Baby on Mom's Client ID? (Radio buttons for Yes and No)
- Is this a Medicare Crossover Claim? (Radio buttons for Yes and No)

Red arrows and text annotations highlight the required selections:

- A red arrow points to the 'No' radio button for 'Is this claim for a Baby on Mom's Client ID?' with the text '14 Select'.
- A red arrow points to the 'No' radio button for 'Is this a Medicare Crossover Claim?' with the text '15 Select'.

Professional Claim (Template)

16. **Select** No for Accident Related (required)



The screenshot shows the 'Create Template' interface in ProviderOne. The 'CLAIM INFORMATION' section is expanded, showing options for PRIOR AUTHORIZATION, CLAIM NOTE, EPSDT INFORMATION, and CONDITION INFORMATION. Below these is the question: '* Is this claim accident related?' with radio buttons for 'Yes' and 'No'. A blue arrow points to the 'No' radio button. The 'CLAIM DATA' section includes fields for 'Patient Account No.' and 'Place of Service'. A red arrow points to the '16 Select' text below the form.

16 Select ↗

At this point you have entered the minimum required information needed to save a template. Follow the steps on the next page to save the template.

You can add more information: Follow the instructions in the Social Service Medical Basic Billing How To Guide and enter all the information for a repetitive claim. Once you have filled in all the repetitive information, follow the steps on the next page to save the template.

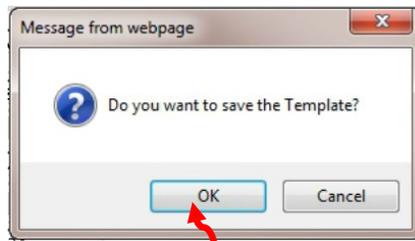
Professional Claim (Template)

17. Click on Save Template

18. Pop-up appears

19. Click on OK

18



19 Click on

Please note: These instructions are for creating a template with the minimum number of entries needed to save the template. Most provider will want to add as much information as possible to the template to reduce the amount of data entry at billing. If you plan to use the Batch (Template) billing method, the template must be a complete bill, including a service line.

20 Claim Template

20. Claim Template page appears

21. Showing New template

22. To Edit, View, Delete, change template name (SaveAs) or Copy a template:

- a. Click on next to desired template name
- b. Select action

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

Time saving tip: To make other templates with the same service information you can make a copy of an existing template, change the client information, rename, and save.

1. Click on box next to desired template name

Claim Template List

Close Add

Create a Claim Template

Type Of Claim: Professional *

Claim Template List:

Edit View Delete SaveAs/Copy Create Batch Create Batch All

Filter By: And Go

<input type="checkbox"/>	Template Name	Template Type	Last Updated By	Last Updated
<input type="checkbox"/>	[REDACTED]	Professional	JonesK	04/01/2013
<input type="checkbox"/>	[REDACTED]	Professional	CurtiJC	03/31/2013
<input type="checkbox"/>	[REDACTED]	Professional	CurtiJC	03/31/2013
<input type="checkbox"/>	[REDACTED]	Professional	JamesM	03/29/2013
<input type="checkbox"/>	[REDACTED]	Professional	JamesM	03/28/2013
<input type="checkbox"/>	[REDACTED]	Professional	CurtiJC	03/28/2013
<input type="checkbox"/>	[REDACTED]	Professional	CurtiJC	03/25/2013

1 Click on



10

2. Click on SaveAs/Copy

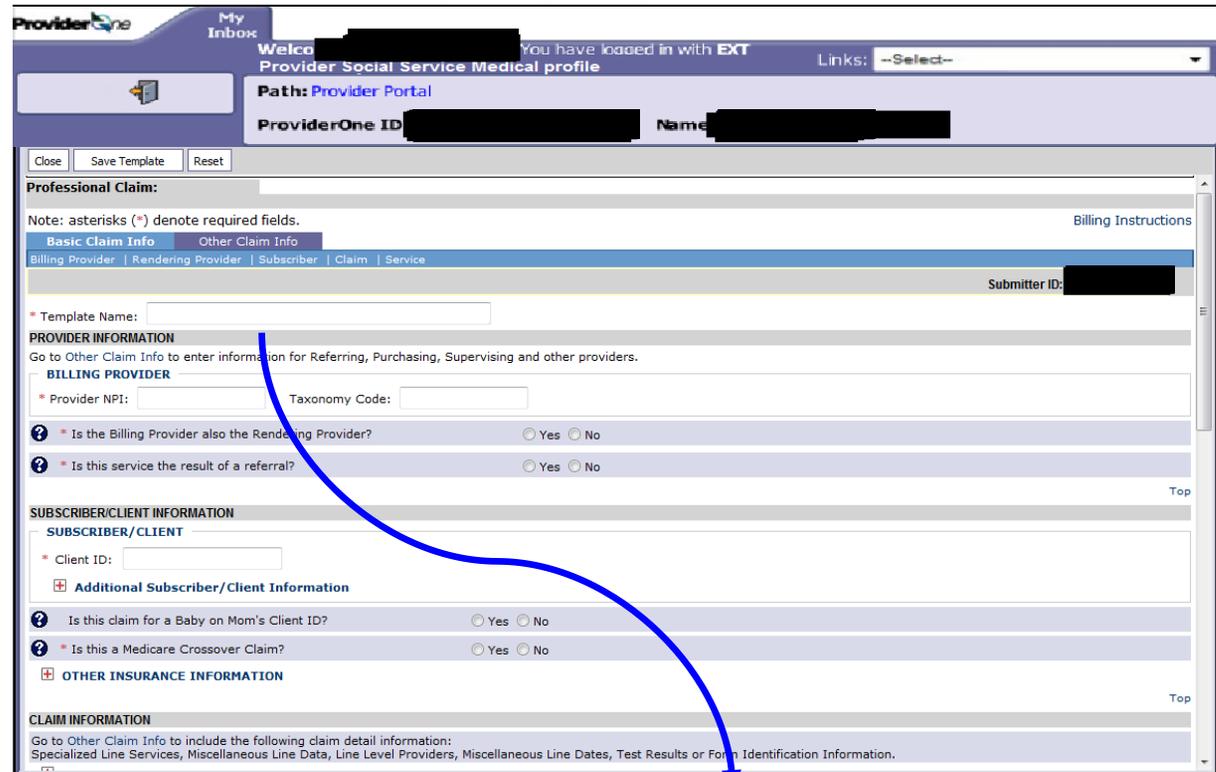
Claim Template List:

Edit View Delete SaveAs/Copy Create Batch Create Batch All

2 Select

3. Template appears
4. Change Template Name

3 Professional Claim (Template)



Professional Claim:

Note: asterisks (*) denote required fields.

Basic Claim Info Other Claim Info Billing Instructions

Billing Provider | Rendering Provider | Subscriber | Claim | Service

Submitter ID: [REDACTED]

* Template Name: [REDACTED]

PROVIDER INFORMATION

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

BILLING PROVIDER

* Provider NPI: [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.



* Template Name: [REDACTED]

4 Change

5. Change Client ID
6. Change Client Information

6 Change

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT

* Client ID: ← 5 Change

+ Additional Subscriber/Client Information

* Org/Last Name: First Name:

* Date of Birth: mm dd ccyy * Gender:

Date of Death: mm dd ccyy Patient Weight: lbs

Patient is pregnant: Yes No

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

? * Is this a Medicare Crossover Claim? Yes No

+ OTHER INSURANCE INFORMATION

7. Change Authorization Number

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

1. * Prior Authorization Number: ← 7 Change

+ CLAIM NOTE

+ EPSDT INFORMATION

+ CONDITION INFORMATION

? * Is this claim accident related? Yes No

9. Change information as needed

9 Change as needed

CLAIM DATA

Patient Account No.:

* Place of Service:

Additional Claim Data

Diagnosis Codes: * 1: 2: 3: 4: 5: 6:

7: 8: 9: 10: 11: 12:

BASIC LINE ITEM INFORMATION

Click on Other Svc Info in each line item to include the following additional line item information: Attachment, Drug, DMERC Condition, Health Services, Test Results, Home Oxygen Therapy, Service Facility, Miscellaneous Numbers, Indicators, Providers, Dates and Amounts, Medical Equipment, Ambulance Transport, Line Item Note, Other Payer, Spinal Manipulations, Purchased Services and Line Adjudication.

BASIC SERVICE LINE ITEMS

* Service Date From: mm dd cyy * Service Date To: mm dd cyy

Place of Service:

* Procedure Code: Modifiers: 1: 2: 3: 4:

* Submitted Charges: \$ Diagnosis Pointers: *1: 2: 3: 4:

* Units:

Medicare Crossover Items

National Drug Code:

Drug Identification

Prior Authorization

Additional Service Line Information

Note: Please ensure you have entered any necessary claim information (found in the other sections on this or another page) before adding this service line.

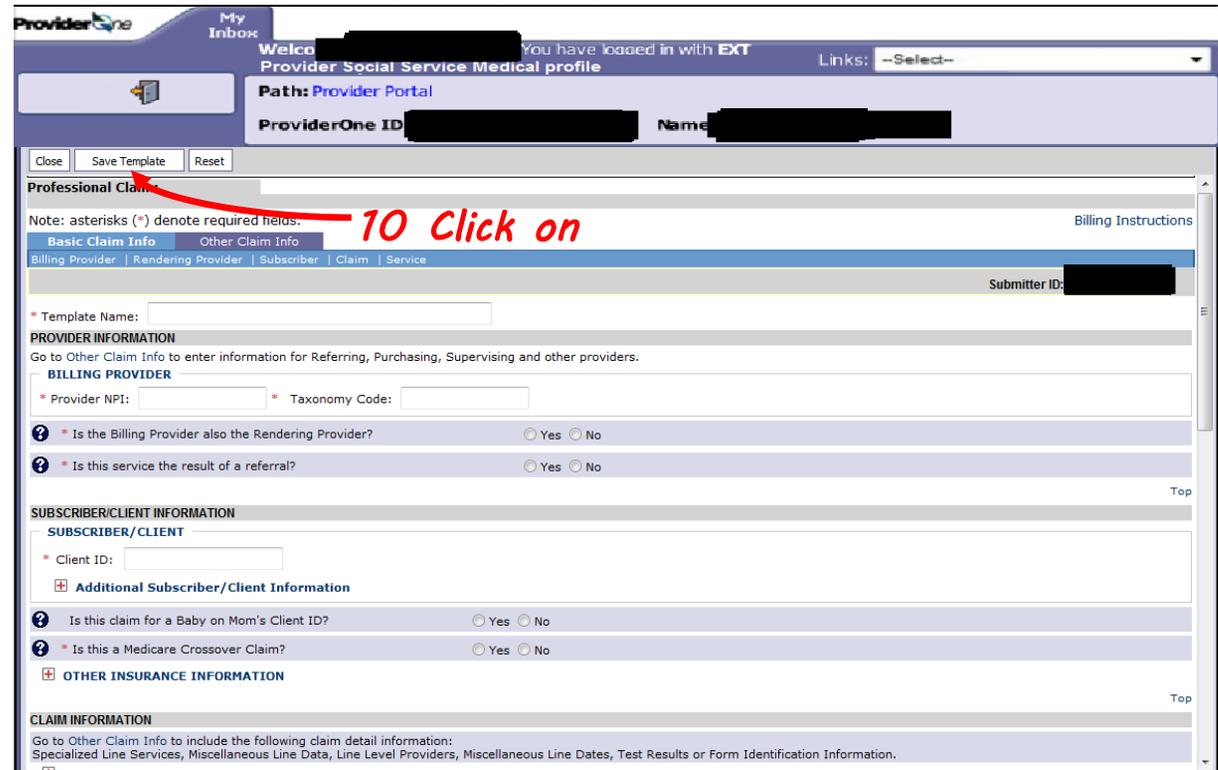
Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information. Total Submitted Charges: \$

Line No	Service Dates		Proc. Code	Modifiers				Diagnosis Pntns				Submitted Charges	Units	PA Number
	From	To		1	2	3	4	1	2	3	4			

10. Click on Save Template
11. Pop-up appears
12. Click on OK

Professional Claim (Template)



Professional Claim

Note: asterisks (*) denote required fields.

10 Click on

Close Save Template Reset

PROVIDER INFORMATION

BILLING PROVIDER

* Provider NPI: * Taxonomy Code:

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:

Additional Subscriber/Client Information

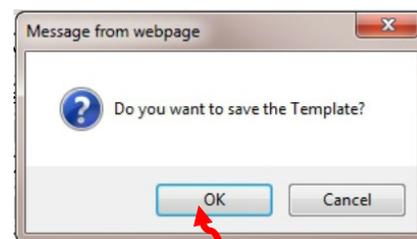
Is this claim for a Baby on Mom's Client ID? Yes No

Is this a Medicare Crossover Claim? Yes No

OTHER INSURANCE INFORMATION

CLAIM INFORMATION

11



12 Click on

13. Claim Template List appears

14. Showing new template and that the original template is still available

13 Claim Template List

Close
Add

Create a Claim Template

Type Of Claim: Professional *

Claim Template List:

Edit View Delete SaveAs/Copy Create Batch Create Batch All

Filter By: And Go

	Template Name	Template Type	Last Updated By	Last Updated
<input type="checkbox"/>	[Redacted]	Professional	JonesK	04/01/2013
<input type="checkbox"/>	[Redacted]	Professional	JonesK	04/01/2013
<input type="checkbox"/>	[Redacted]	Professional	CurtiJC	03/31/2013
<input type="checkbox"/>	[Redacted]	Professional	CurtiJC	03/31/2013
<input type="checkbox"/>	[Redacted]	Professional	JamesM	03/29/2013
<input type="checkbox"/>	[Redacted]	Professional	JamesM	03/28/2013
<input type="checkbox"/>	[Redacted]	Professional	CurtiJC	03/28/2013
<input type="checkbox"/>	[Redacted]	Professional	CurtiJC	03/25/2013

View Template Name

View [Redacted]

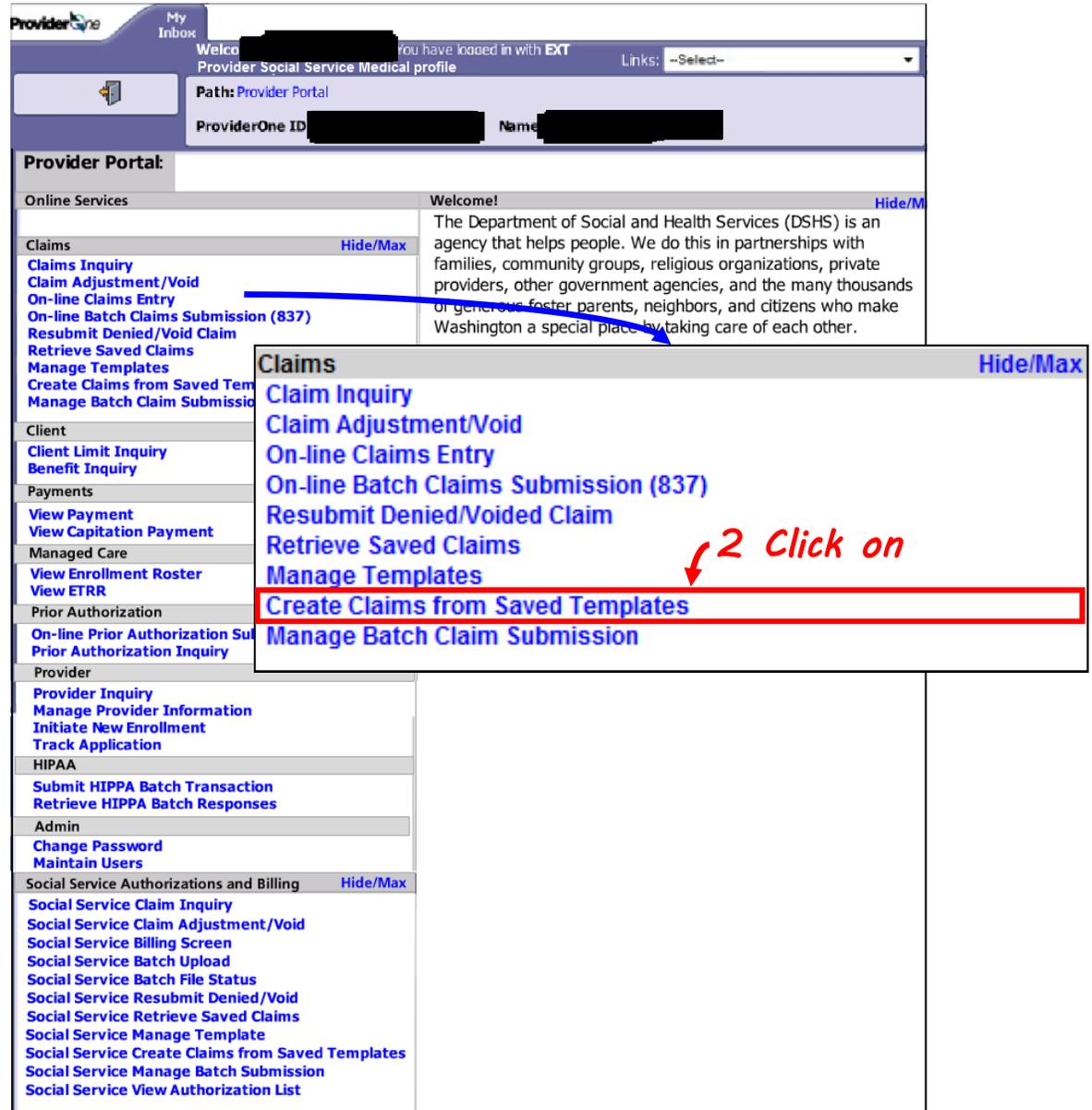
View [Redacted]

14

This section is on how to submit a claim using a saved template.

1. From the [Provider Portal](#)
2. **Click on** Create Claims from Saved Templates

1 Provider Portal



The screenshot shows the Provider Portal interface. The 'Claims' menu is expanded, and the option 'Create Claims from Saved Templates' is highlighted with a red box and a red arrow pointing to it. A red text annotation '2 Click on' is placed next to the arrow. A blue arrow points from the 'Claims' menu header to the 'Create Claims from Saved Templates' option.

Online Services	Welcome!
Claims Hide/Max 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 Manage Batch Claim Submission	Welcome! The Department of Social and Health Services (DSHS) is an agency that helps people. We do this in partnerships with families, community groups, religious organizations, private providers, other government agencies, and the many thousands of generous foster parents, neighbors, and citizens who make Washington a special place by taking care of each other.
Client Client Limit Inquiry Benefit Inquiry	
Payments View Payment View Capitation Payment	
Managed Care View Enrollment Roster View ETRR	
Prior Authorization On-line Prior Authorization Submission Prior Authorization Inquiry	
Provider Provider Inquiry Manage Provider Information Initiate New Enrollment Track Application	
HIPAA Submit HIPPA Batch Transaction Retrieve HIPPA Batch Responses	
Admin Change Password Maintain Users	
Social Service Authorizations and Billing Hide/Max Social Service Claim Inquiry Social Service Claim Adjustment/Void Social Service Billing Screen Social Service Batch Upload Social Service Batch File Status Social Service Resubmit Denied/Void Social Service Retrieve Saved Claims Social Service Manage Template Social Service Create Claims from Saved Templates Social Service Manage Batch Submission Social Service View Authorization List	

3. Create Social Service Claim from Saved Templates page [appears](#)

3 Create Claim Template

Close

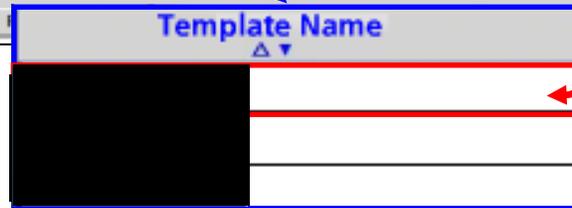
Create Claim from Saved TemplatesList

Filter By: [] And [] Go

Template Name	Template Type	Last Updated By	Last Updated
[REDACTED]	Professional	JonesK	03/10/2013
[REDACTED]	Professional	CurtiJC	03/10/2013
[REDACTED]	Professional	CurtiJC	03/12/2013
[REDACTED]	Professional	CurtiJC	03/15/2013
[REDACTED]	Professional	CurtiJC	03/21/2013
[REDACTED]	Professional	CurtiJC	03/21/2013
[REDACTED]	Professional	CurtiJC	03/30/2013

Viewing Page 1 Next >> 2 Go

4. **Click on** desired template name



← 4 Click on

5. The Billing Screen appears with template data

5 Billing Screen (w/ template data)

6. To submit a claim, use the same process as Submit Professional Claim

a. Verify template data

b. Change data as needed including adding the service line. As with billing, you can add multiple service lines

c. Click on Submit Claim

6b →

6b →

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

- 7. Backup Document Pop-up appears
- 8. **Click on** Cancel (Social Service Medical claims do not require documentation.)

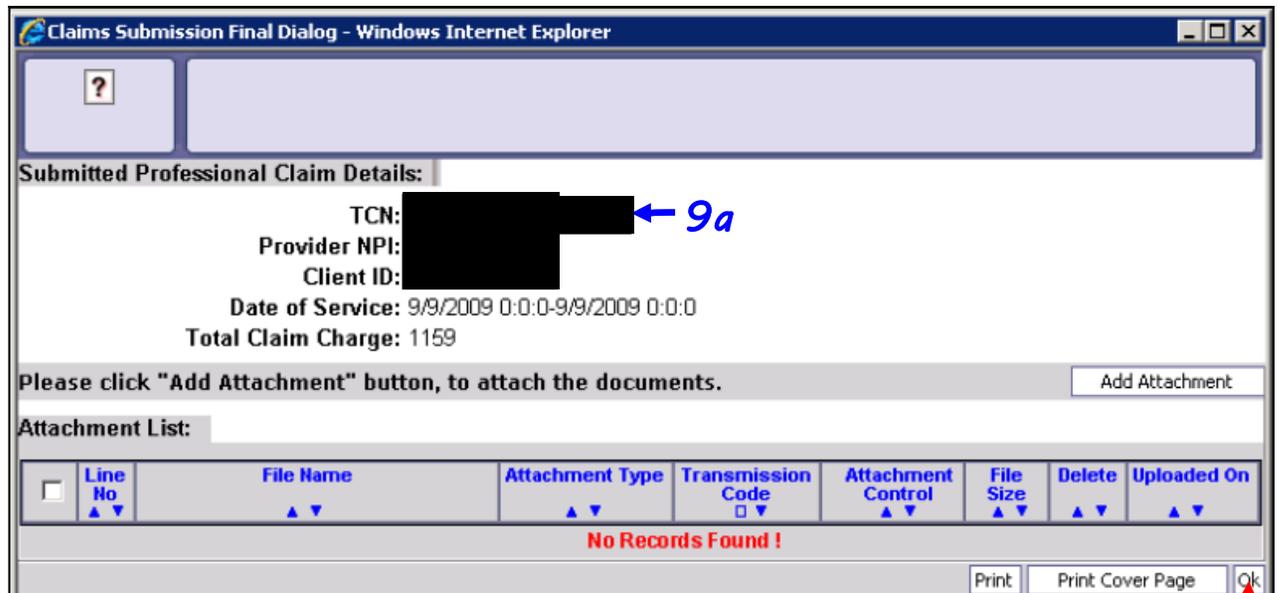
7 Backup Document Pop-up



8 Click on

- 9. Submitted Professional Claim Details appears
 - a. Transaction Control Number (TCN) is used for tracking the claim

9 Submitted Professional Claim Details



9a

9b Click on

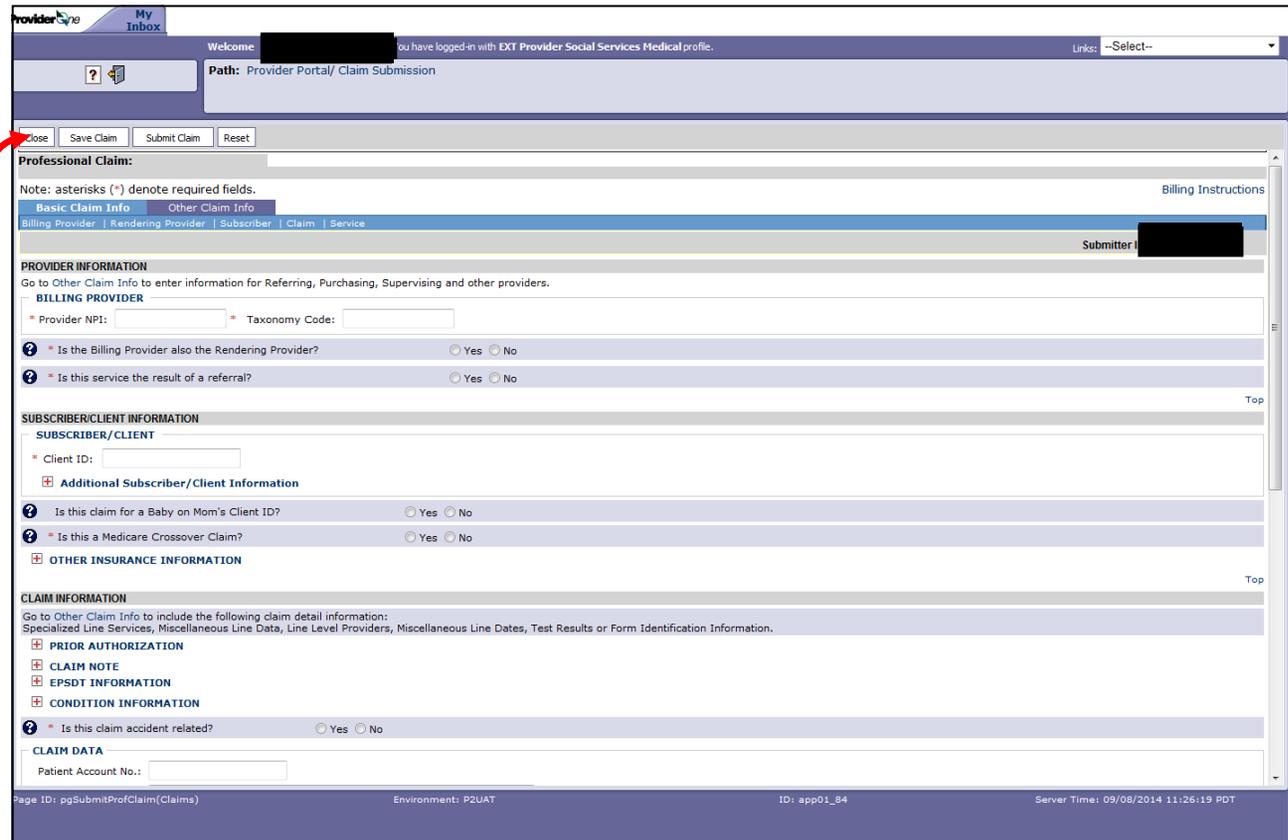
*You **must click on OK** to transmit the claim to ProviderOne.*

10. Blank Billing Screen appears

11. Click on Close

10 Billing Screen (w/ template data)

11 Click on

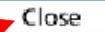


12. Create Claim from Save Template
appears

13. **Select** an new template
or

14. **Click on** Close to return
to Portal Page.

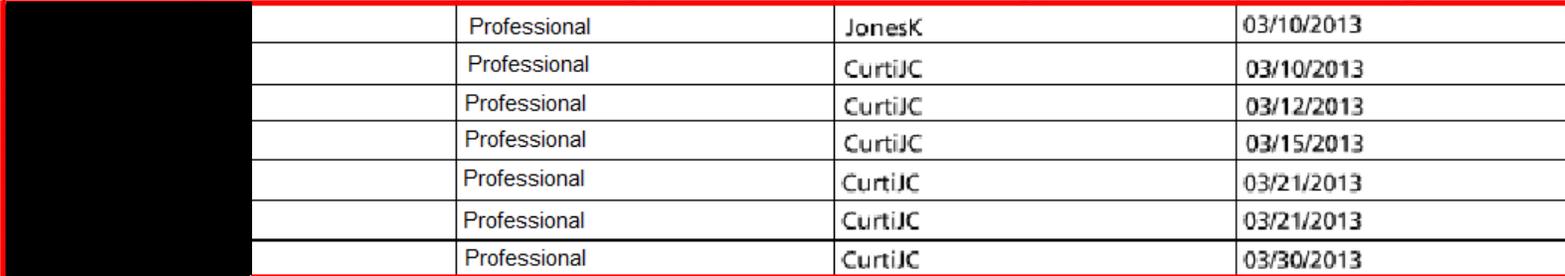
12 Create Claim from Saved Template

14 Click on 

Create Claim from Saved TemplatesList

Filter By: And Go

Template Name	Template Type	Last Updated By	Last Updated
	Professional	JonesK	03/10/2013
	Professional	CurtiJC	03/10/2013
	Professional	CurtiJC	03/12/2013
	Professional	CurtiJC	03/15/2013
	Professional	CurtiJC	03/21/2013
	Professional	CurtiJC	03/21/2013
	Professional	CurtiJC	03/30/2013

13 Select 

Viewing Page 1 Next >> 2 Go Page Count SaveToXLS