

Verify Line Items Prior to Sending Claims

Last Modified on 08/19/2022 8:37 am EDT

Path: File > Billing > Line Items

About

Once Services have been processed into Line Items, they can be reviewed in the Line Items List or opened individually for review or edits. Line Items contain all of the service information such as Activity Code, Start/End Time, Event Date, Procedure Code, ICD-10 code, Billed, Screened, Paid and Adjustment amounts, Modifiers, and previous claim Submission History. Once you get comfortable with the Billing process, you may not find it necessary to verify Line Items before directly sending or printing Claims.

Review Line Items

1. Navigate to the Line Items Filters Form by following the path above.
2. Use the filters to limit your search.



Note: If you do not select any filters and keep **ALL** as selected for the Line Item Status, you will receive a prompt, "By not entering any filters, you have chosen to select all of the line item records in the database. Please click Yes to continue or No to cancel." If you click Yes, all Line Items in the system will populate.

3. Click the **OK** button and the Line Items List displays.
4. Here you can confirm the **Print Status** for the Line Items you want to go out in the next batch of claims.



Note: Y (Yes), S (Sent), R (Reprocess) statuses mean that any Line Item with these statuses will be picked up in the next batch of claims that go out. A Print Status of N (No) means that the Line Item will not be picked up in the next batch of claims to go out.

Line Items List - (LINITML)											
Party Type	Party Type Desc	Insurance ID	Insurance Name	Billing Date	MCaid Res	MCare Stat	Oth Ins	Closed	Print Status	Billed Amount	Remark
3	Other Insurance	BUR	Burnam Insurance	06/01/2021				N	N	200.00	
5	Private Pay	SP	SELF PAY	06/01/2021				N	Y	0.00	
3	Other Insurance	BUR	Burnam Insurance	06/01/2021				N	N	200.00	
5	Private Pay	SP	SELF PAY	06/01/2021				N	Y	0.00	
2	Blue Cross/Blue Shi	BCFP	BLUE CROSS FER	06/02/2021				N	N	175.00	

Filter(s) in effect. 5 Record(s) found.

Ok Cancel Filters Transactions Transaction History Prompt To Refresh

Review or Edit Line Item Detail

1. Within the Line Items List, select a Line Item.
2. Click the **Ok** button and the Line Item Form displays.

Line Item Form - (LINITML)

Line Item Type: S Case No.: 3286 Prime, Optimus Event Date: 05/31/2022 Start Time: 05:00 PM End Time: 12:00 AM Elapsed Time: **:00 Agency ID: 1 Program ID: [dropdown]

Service ID: 2211 Discipline code: 1 MD Physician / CSW: [dropdown] Insurance ID: 1-3 Party Type: 3 Other Insurance: [dropdown]

Activity Code ID: 90853 Staff ID: 0277 In/Outpatient: O Billing Group: [dropdown] ICD-9: [dropdown] ICD-10: [dropdown] Number in Group: 1 Subscriber No.: 12345ins Medicaid Status Codes: [dropdown] Resource Code: [dropdown]

Billing Date: 06/08/2022 Prior Authorization: [dropdown] Procedure Code ID: 90853 Diagnosis 1: A18.2 ICD: [dropdown] Diagnosis 2: [dropdown] ICD: [dropdown] Diagnosis 3: [dropdown] ICD: [dropdown] Diagnosis 4: [dropdown] ICD: [dropdown] Assignment Accepted: [checkbox] Provider ID: 123456 Medicare Status Code: [dropdown] Other Ins Code: [dropdown] Private Pay Statement Date (Y/N/S/R): [dropdown] Print Status: [dropdown]

Modifiers: [dropdown] Additional Modifier: [dropdown] Override Modifiers Activity: [checkbox] Group Modifiers Activity: [checkbox] Line Item Closed: [checkbox] Invoice Date: [dropdown] Statement Date: [dropdown]

Remarks: [text area] Place of Contact/Service: 11 Site ID: [dropdown] Living Arrangement: [dropdown] Private Pay Printed: [checkbox] Date Posted to AR: [dropdown] Claim Frequency Code: 1 Original Reference Number: [dropdown]

Quantity	Billed Amount	Screen Amount	Paid Amount	Adjusted Amount	Current Balance	Approved Amount	Deductible Amount	Co-Pay Amount	Patient Pay Amount
1.00	\$100.00	\$100.00	\$0.00	\$0.00	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00

Denied: [checkbox] Denied Date: [dropdown] Denied Reason 1: [dropdown] Denied Reason 2: [dropdown] Denied Reason 3: [dropdown] Referring Physician Override: [dropdown]

Notes: [text area] Claim Reference: L1065C328617 NDC: [dropdown] NDC Units: 0.00 Unit Of Measure: [dropdown]

Agency: 1 Test Agency Reverse Charge Date: [dropdown] Transaction Set Control #: [dropdown] Submission #: [dropdown] Send As Primary: [checkbox] Send Notes on 837 in 2400 NTE: [checkbox] Submission History: 0 Record(s) found. Invoice Date Trans Set Control # Sub #

Staff: 0277, abby Line Item Status: 1 Program: [dropdown] Physician / CSW: [dropdown] Send Notes on 837 in 2400 SV101-7: [checkbox]

User Id: Testing04 Control Date/Time: 06/08/2022 07:46:25 PM

Buttons: Add, Edit, Delete, Exit (Esc), Transactions, Transactions Hist, Line Item List, Post, Resubmit

3. Review the information and click **Edit** to make any changes if necessary.

Note: You can also navigate to the Transactions Form for an individual Line Item by clicking on **Transactions** or review the transaction history by clicking on **Transactions Hist**. If the Line Item was previously submitted to the clearinghouse, you would see the information in the **Submission History** grid in the screen's lower right-hand corner.