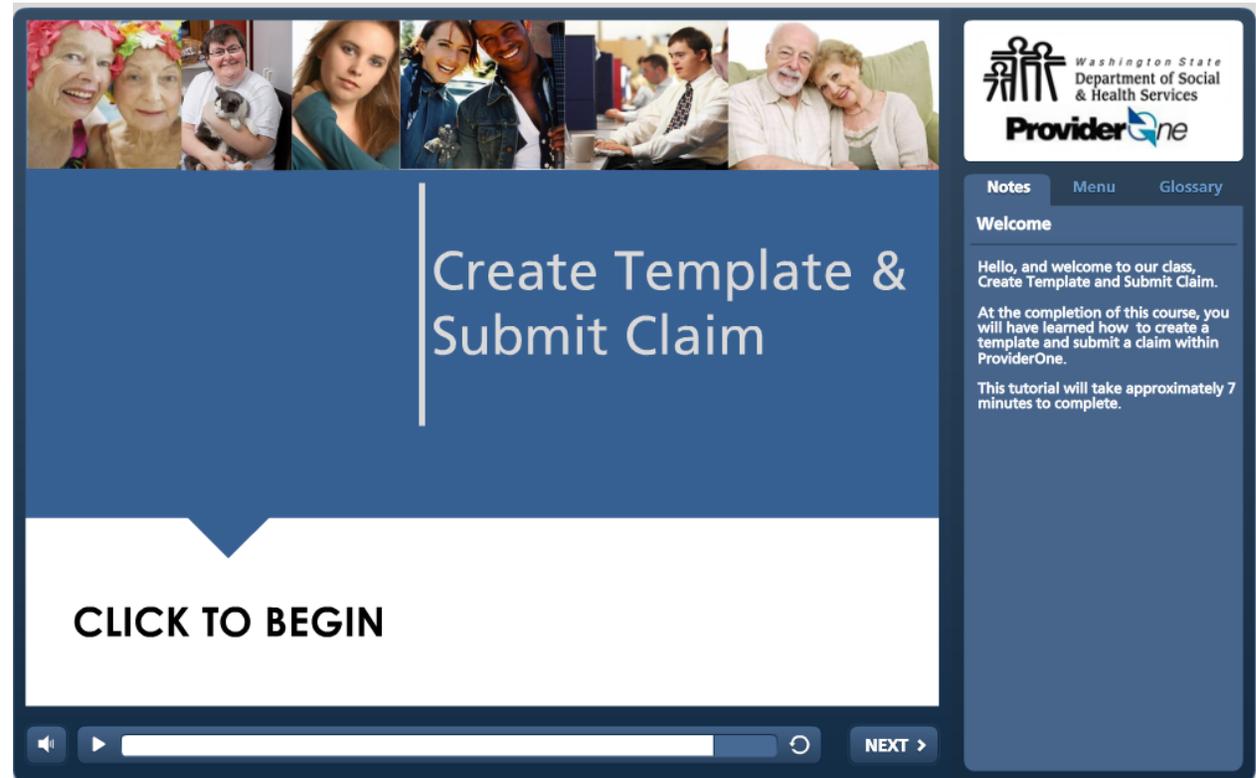


The “Create Template & Submit Claim” How To provides instructions on:

- Create Template 2
- Copy Template (Time Saving Tip) 10
- Submit Saved Template 14
- Turn Off Pop-up Blocker 20

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.



The screenshot shows a video player interface. At the top, there is a banner with several small images of people. Below the banner, the title "Create Template & Submit Claim" is displayed in large white text on a dark blue background. A large white button with the text "CLICK TO BEGIN" is centered below the title. On the right side of the video player, there is a sidebar with the Washington State Department of Social & Health Services logo and "ProviderOne" branding. The sidebar contains a "Welcome" message: "Hello, and welcome to our class, Create Template and Submit Claim. At the completion of this course, you will have learned how to create a template and submit a claim within ProviderOne. This tutorial will take approximately 7 minutes to complete." At the bottom of the video player, there are navigation controls including a play button, a progress bar, a refresh button, and a "NEXT >" button.

This section is on how to create a saved template.

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

1 Provider Portal

The screenshot shows the ProviderOne portal interface. At the top, it says 'Welcome Jones, Katherine. You have logged in with EXT'. Below that, it shows 'Path: Provider Portal' and 'ProviderOne ID: 2011020 Name: Katherine Jones'. The main content area is titled 'Provider Portal:' and contains several sections: 'Online Services', 'Welcome!', 'My Reminders', and 'Social Service Authorizations and Billing'. The 'Social Service Authorizations and Billing' section is expanded, showing a list of links. A blue arrow points from the 'Social Service Manage Template' link in the list to a larger, detailed view of the same menu.

NOTE: You must turn off your pop-up blocker before you begin billing.

See page 20 for the quick instructions on how to turn off your computer's pop-up blocker.

2 Click on →

This is a detailed view of the 'Social Service Authorizations and Billing' menu. The menu items are listed in blue text. The item 'Social Service Manage Template' is highlighted with a red box, and a red arrow points to it from the text '2 Click on →'.

- Social Service Authorizations and Billing
- 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. The Create Claim Template page appears. The page lists:

- a. All the saved templates within your domain
- b. If you have a lot of templates you can use the filters to find a template
- c. You can sort a column using the to read A-Z/1-9 or Z-A/9-1

3 Create Claim Template

3c

3a

3b

Template Name	Template Type	Last Updated By	Last Updated
Lewis-SA722	Social Service	CurtiJC	03/31/2013
Meyer-SA722	Social Service	CurtiJC	03/31/2013
Wilborn-SA420	Social Service	CurtiJC	03/29/2013
Hogan-SA686	Social Service	JamesM	03/28/2013
Self-SA686	Social Service	JamesM	03/28/2013
McDaniel-SA722	Social Service	CurtiJC	03/25/2013
Hill-SA722	Social Service	CurtiJC	04/01/2013

Filter By:

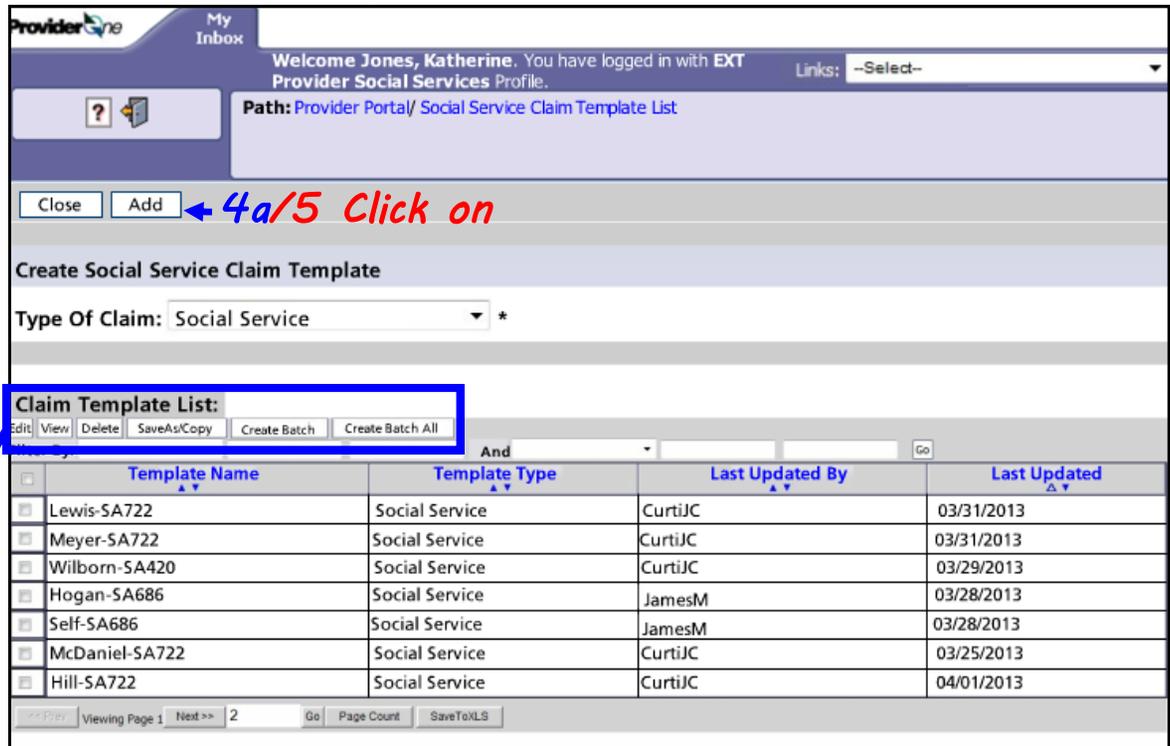
- Authorization Number
- Client First Name
- Client ID
- Client Last Name
- From Date of Service
- Last Updated By
- Last Updated Date
- Provider ID
- Service Code
- Template Name
- Template Type
- To Date of Service

- 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 claims.

4. The page is used to:
 - a. Add a new template
 - b. Edit a saved template
 - c. View a saved template
 - d. Delete a template
 - e. Change template name or copy template
 - f. Create a template batch

5. To create a new template
Click on Add

Create Claim Template



Close Add *4a/5 Click on*

Create Social Service Claim Template

Type Of Claim: Social Service *

Claim Template List:

	Template Name	Template Type	Last Updated By	Last Updated
<input type="checkbox"/>	Lewis-SA722	Social Service	CurtiJC	03/31/2013
<input type="checkbox"/>	Meyer-SA722	Social Service	CurtiJC	03/31/2013
<input type="checkbox"/>	Wilborn-SA420	Social Service	CurtiJC	03/29/2013
<input type="checkbox"/>	Hogan-SA686	Social Service	JamesM	03/28/2013
<input type="checkbox"/>	Self-SA686	Social Service	JamesM	03/28/2013
<input type="checkbox"/>	McDaniel-SA722	Social Service	CurtiJC	03/25/2013
<input type="checkbox"/>	Hill-SA722	Social Service	CurtiJC	04/01/2013

Claim Template List:

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

4b *4c* *4d* *4e* *4f*

6. The Social Service Claim Template Screen appears. This page is a Basic Billing page with an added Template Name (6a) field.

7. At a minimum you must enter the top four fields to save the template

- a. **Enter** Template Name. You create the template name
- b. **Enter** Provider ID from authorization
- c. **Enter** Client ID from authorization
- d. **Enter** Authorization # from Authorization
- e. To save the template. **Click on** Save Template

Note: ProviderOne will check that the Client and Authorizations match prior to allowing you to save the template.

6 Social Service Claim Template Screen

7e Click on

6a

7a Enter

7b Enter

7c Enter

7d Enter

7

Required Data to Save Template

1. Template Name
2. Provider ID
3. Client ID
4. Authorization Number

Template Name: You create the name. Use a name that will help you manage your templates. The example uses the clients name "Waters" and the service code (-SA420). What you use if up to you.

8. You can add **Basic Line Information** to the template prior to saving
 - a. **Enter** Service Dates, Enter the same date (one day of service). When you use the template for billing you will always change the date
 - b. **Enter** Service Code from authorization
 - c. **Enter** Modifier (if applicable) from authorization

Social Service Claim Template Screen

Close Save Template Reset

Welcome Jones, Katherine. You have logged in with EXT
Provider Social Services Profile. Links: --Select--

Path: Provider Portal/ Social Service Claim Template List

Social Service Provider Billing Screen:
Note: asterisks (*) denote required fields. [Billing Instructions](#)

Basic Claim Information
Provider Billing | Subscriber | Claim | Service
Submitter ID: 201102008

PROVIDER INFORMATION
* Template Name: Waters-SA420

BILLING PROVIDER
* Provider ID: 201102008

SUBSCRIBER/CLIENT INFORMATION
SUBSCRIBER/CLIENT
* Client ID: 200907004WA

CLAIM INFORMATION
CLAIM INFORMATION
* Authorization Number: 1000000234

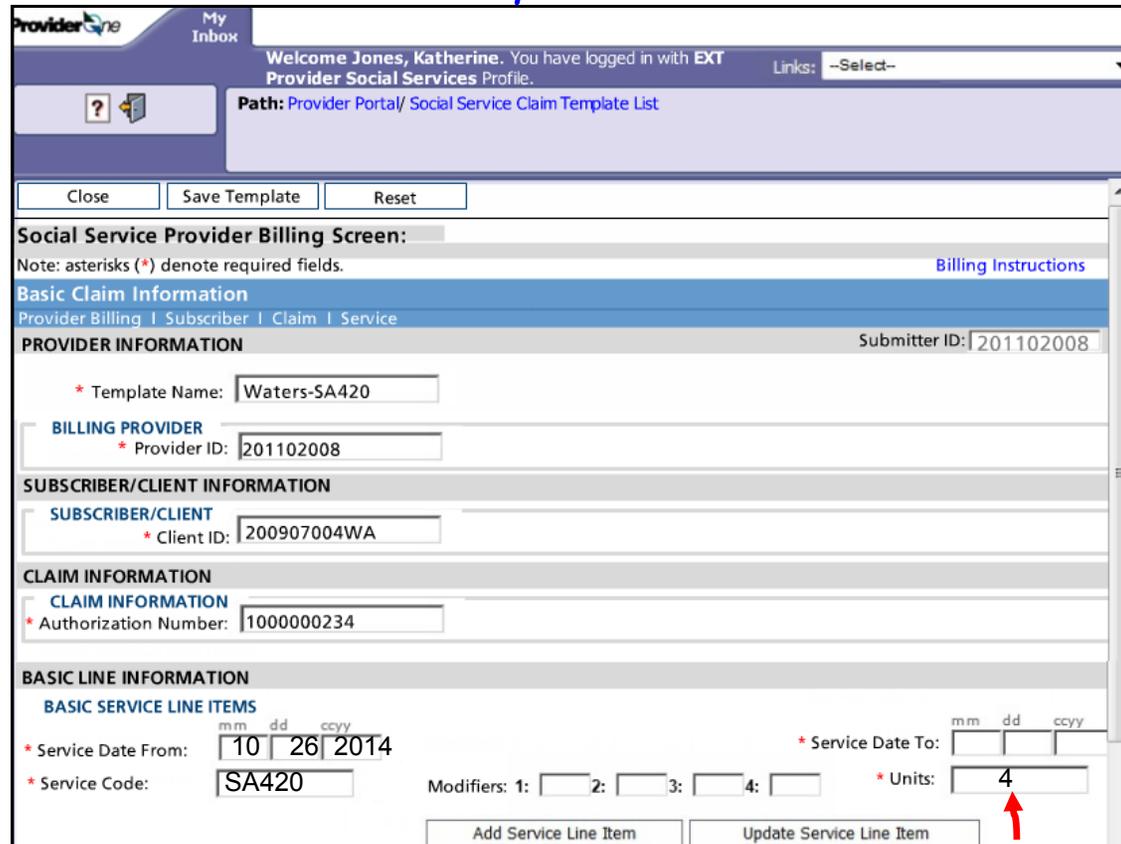
BASIC LINE INFORMATION
BASIC SERVICE LINE ITEMS

* Service Date From: 10 26 2014 * Service Date To: 10 26 2014
* Service Code: SA420 Modifiers: 1: 2: 3: 4: * Units:
Add Service Line Item Update Service Line Item

Note: ProviderOne will not let you save the template if a date in in the future.

Social Service Claim Template Screen

- d. Enter number of units. See note



The screenshot shows the 'Social Service Claim Template Screen' in the ProviderOne system. The user is Katherine Jones, logged in with EXT. The path is 'Provider Portal/ Social Service Claim Template List'. The form contains several sections:

- PROVIDER INFORMATION:** Template Name: Waters-SA420
- BILLING PROVIDER:** Provider ID: 201102008
- SUBSCRIBER/CLIENT INFORMATION:** Client ID: 200907004WA
- CLAIM INFORMATION:** Authorization Number: 1000000234
- BASIC LINE INFORMATION:** Service Date From: 10/26/2014, Service Date To: (empty), Service Code: SA420, Modifiers: 1: (empty), 2: (empty), 3: (empty), 4: (empty), Units: 4

A red arrow points to the 'Units' field, which contains the value '4'. Below the arrow, the text '8d Enter' is written in red.

8d Enter

Note: The number of units should be the number of reoccurring units for this Service Code in a single day. As with Basic Billing, if the claim meets the requirements to use a date range, span, then the unit number is the total days within the date range for daily unit types; or the number of months within the date range for monthly unit types.

At this point, if you will be using the template method to claim you can save the template or choose to follow the additional steps to add a service line.

- e. To save the template. **Click on Save Template**
- f. Pop-up **appears**
- g. **Click on OK**

If you will be using the Batch Template method you must add the service line before you save the template to make the Batch Template process more efficient.

- h. **Click on Add Service Line**
- i. Service line **appear**. Follow steps e. f. and g. to save the template.

If the pop-up does not appear, see page 20 for the quick instructions on how to turn off your computer's pop-up blocker.

Social Service Claim Template Screen

Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information. Total Charges Submitting: \$75.00

Line No	Service Dates	Service Code	Modifiers	Units			
	From	To	1	2	3	4	
1	01/28/2014	01/28/2014	SA 420	10			Delete

9 Claim Template List

9. Claim Template List page appears
10. Showing New template
11. To Edit, View, Delete, change template name (SaveAs) or Copy a template:
 - a. Click on next to desired template name
 - b. Select action

Close Add

Create Social Service Claim Template

Type Of Claim: Social Service *

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"/>	Waters-SA420	Social Service	JonesK	04/01/2013
<input type="checkbox"/>	Lewis-SA722	Social Service	CurtiJC	03/31/2013
<input type="checkbox"/>	Meyer-SA722	Social Service	CurtiJC	03/31/2013
<input type="checkbox"/>	Wilborn-SA420	Social Service	JamesM	03/29/2013
<input type="checkbox"/>	Hogan-SA686	Social Service	JamesM	03/28/2013
<input type="checkbox"/>	Self-SA686	Social Service	CurtiJC	03/28/2013
<input type="checkbox"/>	McDaniel-SA722	Social Service	CurtiJC	03/25/2013

Viewing Page 1 Next >> 2 Go Page Count SaveToXLS

Template Name

Waters-SA420

11

11a Click on

10

Claim Template List:

Edit View Delete SaveAs/Copy Create Batch Create Batch All

11b Select

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.

9 Create Claim Template

Close Add

Create Social Service Claim Template

Type Of Claim: Social Service *

Claim Template List:

Edit View Delete SaveAs/Copy Create Batch Create Batch All

Template Name	Template Type	Last Updated By	Last Updated
<input type="checkbox"/> Waters-SA420	Social Service	JonesK	04/01/2013
<input type="checkbox"/> Lewis-SA722	Social Service	CurtiJC	03/31/2013
<input type="checkbox"/> Meyer-SA722	Social Service	CurtiJC	03/31/2013
<input type="checkbox"/> Wilborn-SA420	Social Service	JamesM	03/29/2013
<input type="checkbox"/> Hogan-SA686	Social Service	JamesM	03/28/2013
<input type="checkbox"/> Self-SA686	Social Service	CurtiJC	03/28/2013
<input type="checkbox"/> McDaniel-SA722	Social Service	CurtiJC	03/25/2013

1. Click on box next to desired template name

1 Click on

2. Click on SaveAs/Copy



Waters-SA420

10

Claim Template List:

Edit View Delete SaveAs/Copy Create Batch Create Batch All

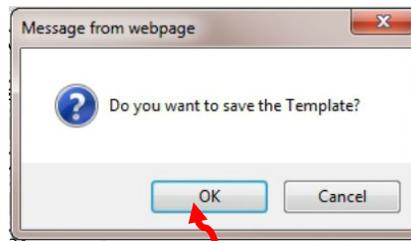


2 Select

3. Template appears
4. Change Template Name
5. Change Client ID
6. Change Authorization Number
7. Change information (including service line, if applicable) needed
8. Click on Save Template
9. Pop-up appears
10. Click on OK

3 Template

9



10 Click on

11. Create Claim Template page appears
12. Showing new template and that the original template is still available

11 Create Claim Template

Close
Add

Create Social Service Claim Template

Type Of Claim: Social Service *

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"/>	Waters-SA420	Social Service	JonesK	04/01/2013
<input type="checkbox"/>	Smith	Social Service	JonesK	04/01/2013
<input type="checkbox"/>	Lewis-SA722	Social Service	CurtiJC	03/31/2013
<input type="checkbox"/>	Meyer-SA722	Social Service	CurtiJC	03/31/2013
<input type="checkbox"/>	Wilborn-SA420	Social Service	JamesM	03/29/2013
<input type="checkbox"/>	Hogan-SA686	Social Service	JamesM	03/28/2013
<input type="checkbox"/>	Self-SA686	Social Service	CurtiJC	03/28/2013
<input type="checkbox"/>	McDaniel-SA722	Social Service	CurtiJC	03/25/2013

	Template Name
<input type="checkbox"/>	Waters-SA420
<input type="checkbox"/>	Smith

← 12

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

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

1 Provider Portal

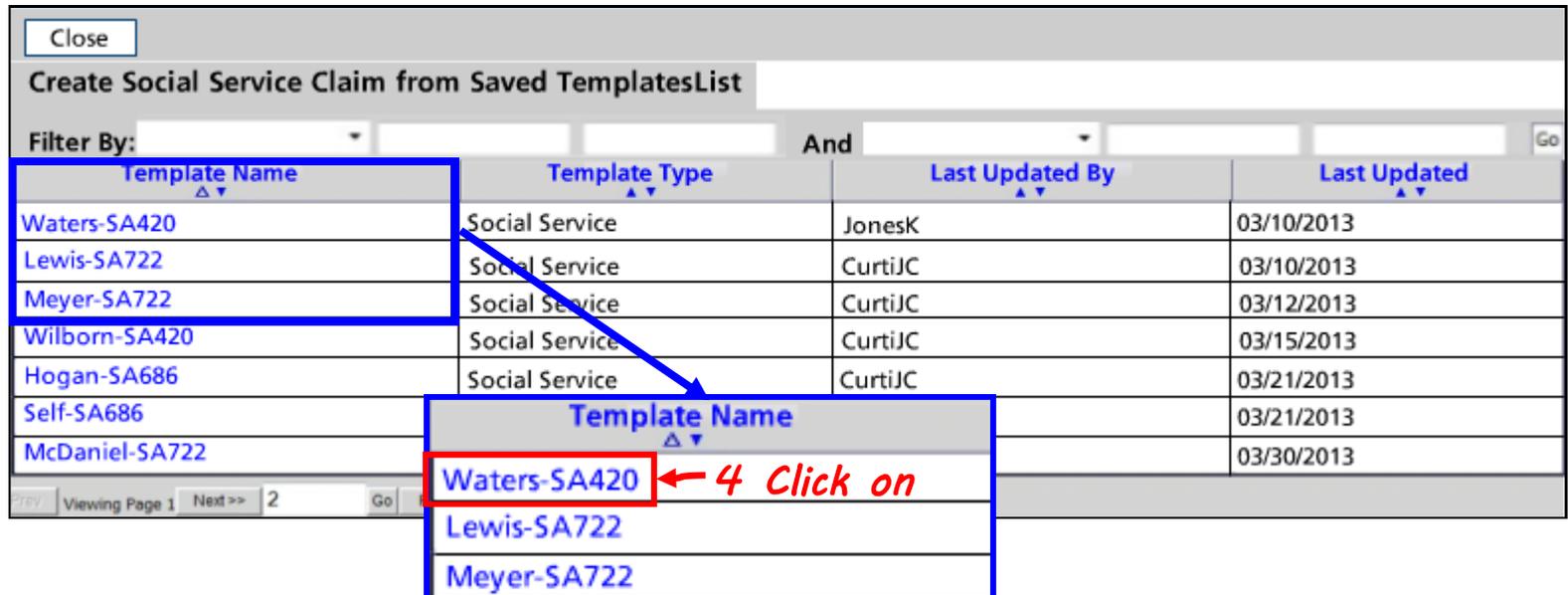
You must turn off your pop-up blocker before you begin billing.

See page 20 for the quick instructions on how to turn off your computer's pop-up blocker.

2 Click on →

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

3 Create Claim Template



Close

Create Social Service Claim from Saved TemplatesList

Filter By: [] And [] [Go]

Template Name	Template Type	Last Updated By	Last Updated
Waters-SA420	Social Service	JonesK	03/10/2013
Lewis-SA722	Social Service	CurtiJC	03/10/2013
Meyer-SA722	Social Service	CurtiJC	03/12/2013
Wilborn-SA420	Social Service	CurtiJC	03/15/2013
Hogan-SA686	Social Service	CurtiJC	03/21/2013
Self-SA686			03/21/2013
McDaniel-SA722			03/30/2013

Viewing Page 1 Next >> 2 [Go]

Template Name

- Waters-SA420 ← 4 Click on
- Lewis-SA722
- Meyer-SA722

4. **Click on** desired template name

5. The Billing Screen appears with template data

6. To submit a claim, use the same process as Basic Billing

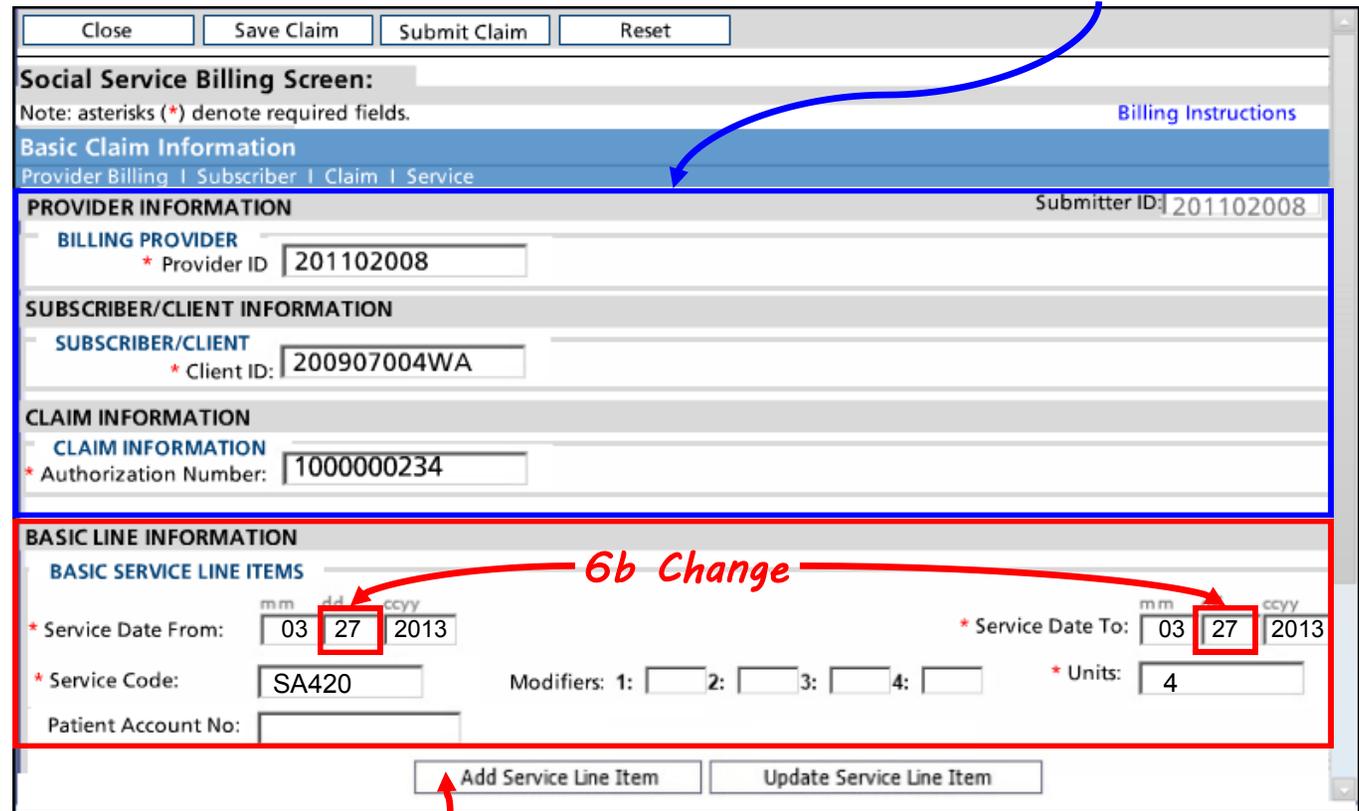
a. **Verify** Information

b. **Change** data for this claim. i.e. date of service

c. **Click on** Add Service Line. You can add additional Service Lines for this Authorization

5 Billing Screen w/ Template Data

6a Verify



Close Save Claim Submit Claim Reset

Social Service Billing Screen:
Note: asterisks (*) denote required fields. [Billing Instructions](#)

Basic Claim Information
Provider Billing | Subscriber | Claim | Service

PROVIDER INFORMATION Submitter ID: 201102008

BILLING PROVIDER
* Provider ID: 201102008

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT
* Client ID: 200907004WA

CLAIM INFORMATION

CLAIM INFORMATION
* Authorization Number: 1000000234

BASIC LINE INFORMATION

BASIC SERVICE LINE ITEMS

* Service Date From: 03 27 2013 * Service Date To: 03 27 2013

* Service Code: SA420 Modifiers: 1: 2: 3: 4: * Units: 4

Patient Account No:

Add Service Line Item Update Service Line Item

6c Click on

7. Service Line appears
8. As with Basic Billing, you can add Service Lines for this authorization. **Click on** the Line Number of a Service Line and it will populate the Basic Line information. Change the claim data and click on Add Service Line. After the new Service Line appears you can add more or submit the claim.
9. **Click on** Submit Claim

Billing Screen

Close Save Claim Submit Claim Reset

Social Service Billing Screen: [Billing Instructions](#)
 Note: asterisks (*) denote required fields.

Basic Claim Information
 Provider Billing | Subscriber | Claim | Service

PROVIDER INFORMATION Submitter ID: 201102008

BILLING PROVIDER
 * Provider ID:

SUBSCRIBER/CLIENT INFORMATION

SUBSCRIBER/CLIENT
 * Client ID:

CLAIM INFORMATION

CLAIM INFORMATION
 * Authorization Number:

BASIC LINE INFORMATION

BASIC SERVICE LINE ITEMS

* Service Date From: * Service Date To:
 * Service Code: Modifiers: 1: 2: 3: 4: * Units:
 Patient Account No:

Add Service Line Item Update Service Line Item

Previously Entered Line Item Information
 Click a Line No. below to view/update that Line Item Information. Total Charges Submitting: \$75.00

Line No	Service Dates		Service Code	Modifiers				Units	Delete
	From	To		1	2	3	4		
1	10/27/2014	10/27/2014	SA 420					10	

Line No	Service Dates
From	
1	10/27/2014

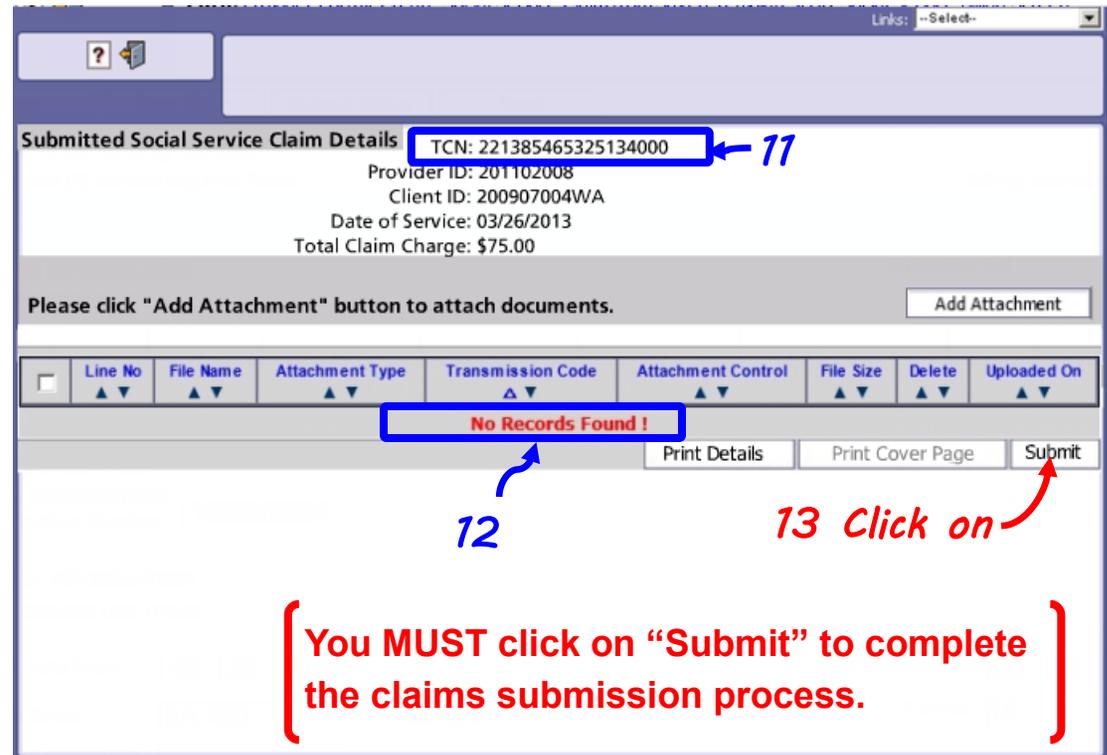
7 →

9 Click on

8 Click on →

10. Submitted Social Service Claim
Details pop-up **appears** See note
11. The Transaction Control
Number (TCN) **appears**
12. **No Records Found** means
that this claim has no
attachment. Never add
attachments.
13. **Click on** Submit

10 Submitted Social Service Claim Details



Submitted Social Service Claim Details

TCN: 221385465325134000
Provider ID: 201102008
Client ID: 200907004WA
Date of Service: 03/26/2013
Total Claim Charge: \$75.00

Please click "Add Attachment" button to attach documents.

Line No	File Name	Attachment Type	Transmission Code	Attachment Control	File Size	Delete	Uploaded On
No Records Found!							

You MUST click on "Submit" to complete the claims submission process.

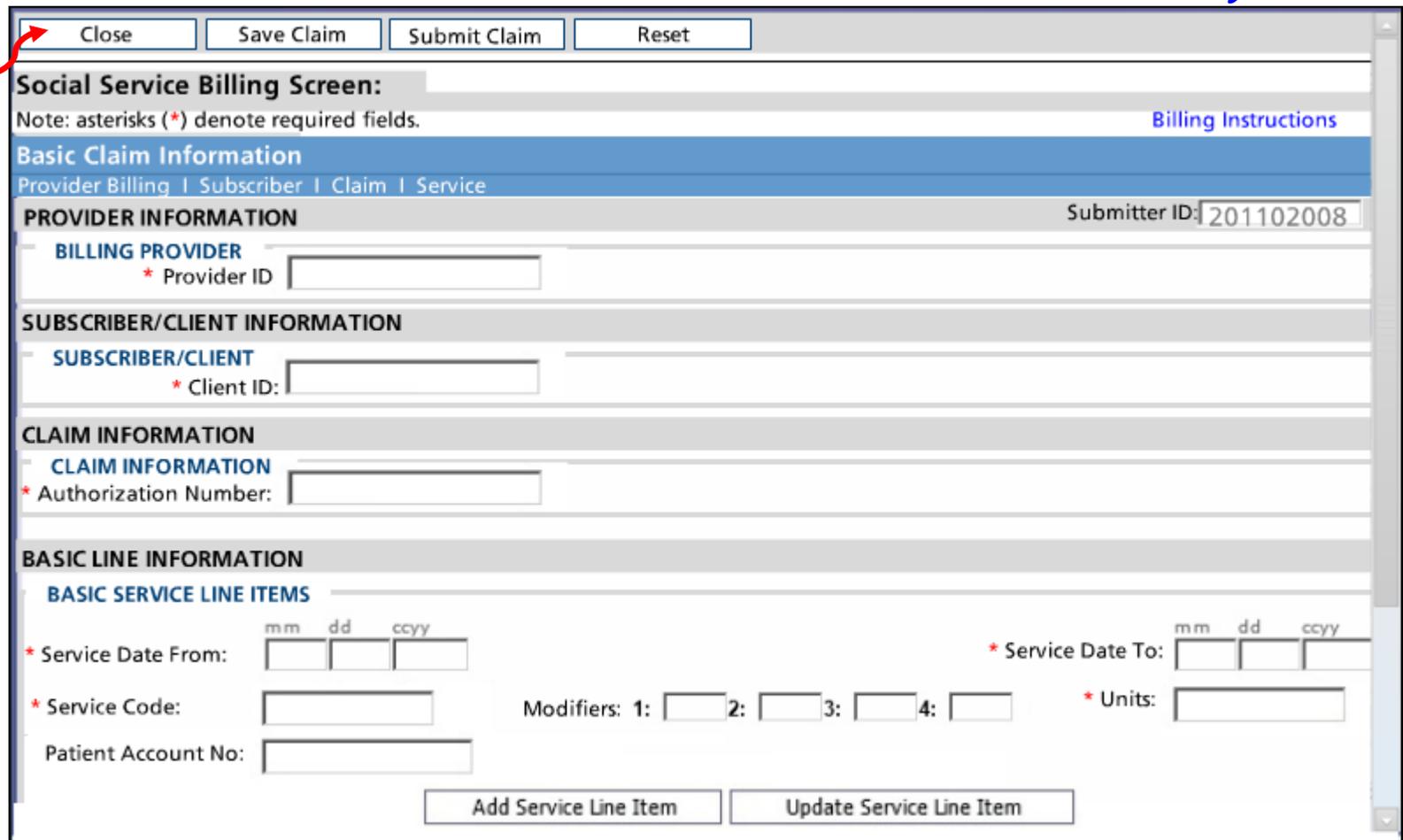
Note: If the pop-up page does not appear, it means that your "Pop-up Blocker" has not been turned off and you need to close this billing page. See page 20 for the quick instructions on how to turn off your computer's pop-up blocker. Then return to the billing page to submit a claim.

14. Blank Social Service Billing Screen
appears

15. Click on Close

14 Social Service Billing Screen

15 Click on



The screenshot shows a web-based form titled "Social Service Billing Screen". At the top, there are four buttons: "Close", "Save Claim", "Submit Claim", and "Reset". A red arrow points to the "Close" button with the text "15 Click on". Below the buttons is a header section with "Social Service Billing Screen:" and a "Note: asterisks (*) denote required fields." on the left, and a "Billing Instructions" link on the right. The form is organized into several sections: "Basic Claim Information" (with sub-links for Provider Billing, Subscriber, Claim, and Service), "PROVIDER INFORMATION" (containing a "BILLING PROVIDER" section with a required "Provider ID" field and a "Submitter ID" field with the value "201102008"), "SUBSCRIBER/CLIENT INFORMATION" (containing a "SUBSCRIBER/CLIENT" section with a required "Client ID" field), "CLAIM INFORMATION" (containing a "CLAIM INFORMATION" section with a required "Authorization Number" field), and "BASIC LINE INFORMATION" (containing a "BASIC SERVICE LINE ITEMS" section with fields for "Service Date From" and "Service Date To" (both with mm, dd, ccyy sub-fields), "Service Code", "Modifiers" (1-4), "Units", and "Patient Account No."). At the bottom of the form are two buttons: "Add Service Line Item" and "Update Service Line Item".

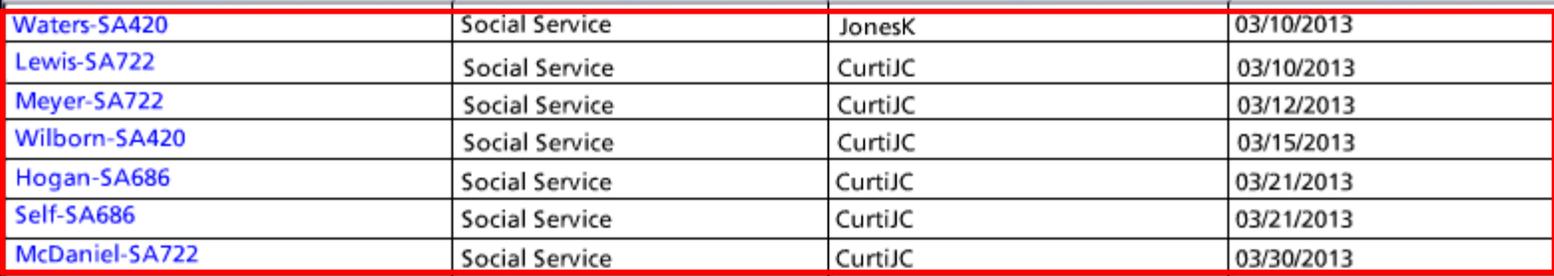
16. Create Social Service Claim from Save Template [appears](#)

17. **Select** an new template
or

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

16 Create Social Service Claim from Saved Template

18 Click on 

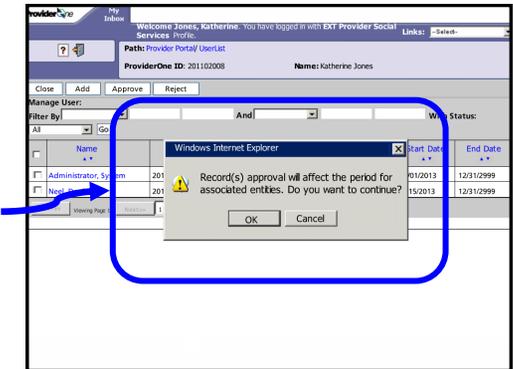
17 Select 

Template Name	Template Type	Last Updated By	Last Updated
Waters-SA420	Social Service	JonesK	03/10/2013
Lewis-SA722	Social Service	CurtiJC	03/10/2013
Meyer-SA722	Social Service	CurtiJC	03/12/2013
Wilborn-SA420	Social Service	CurtiJC	03/15/2013
Hogan-SA686	Social Service	CurtiJC	03/21/2013
Self-SA686	Social Service	CurtiJC	03/21/2013
McDaniel-SA722	Social Service	CurtiJC	03/30/2013

Viewing Page 1 Next >> 2 Go Page Count SaveToXLS

ProviderOne uses “Pop-Up Windows” (small screens or windows that appear in front of the window you are viewing). For ProviderOne to work, your computer must be set to allow pop-up windows. Different computers have different method to turn off the pop-up blocker, here are two common approaches.

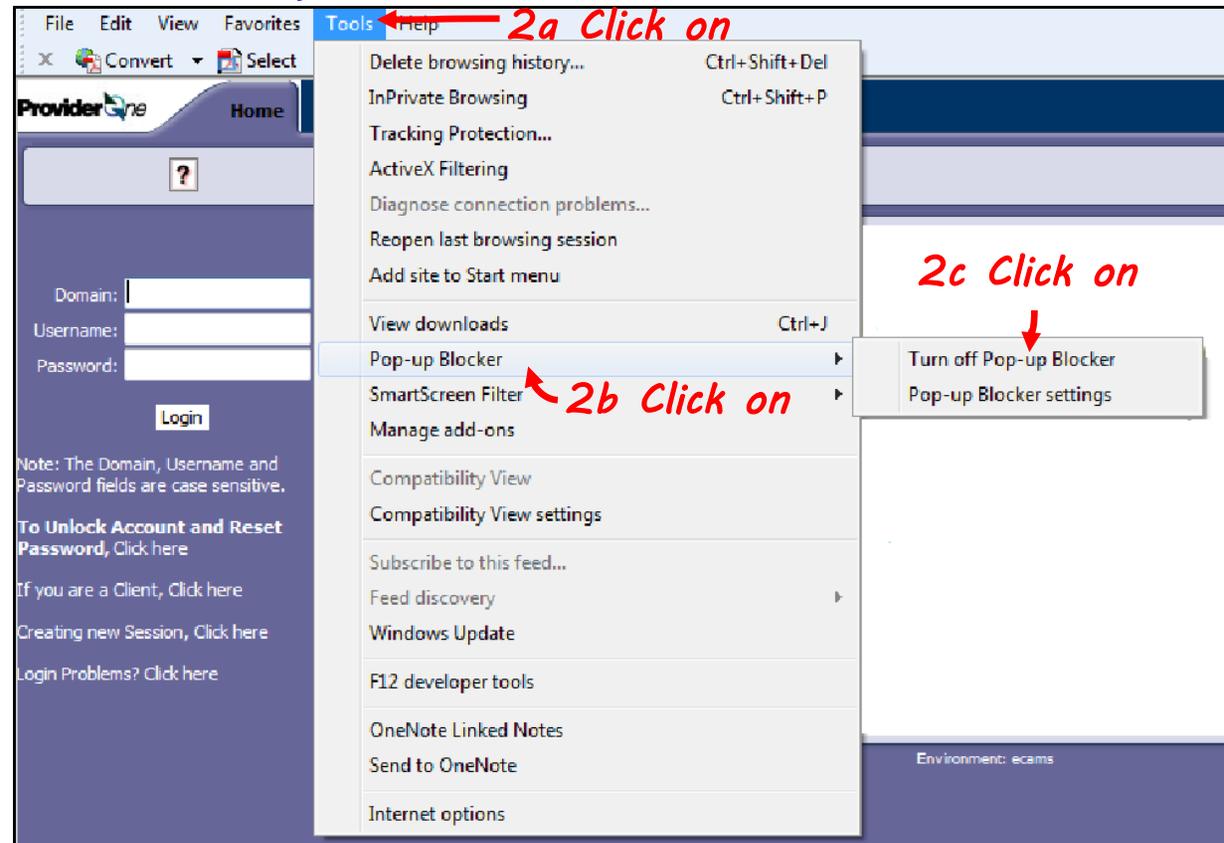
Pop Up Window



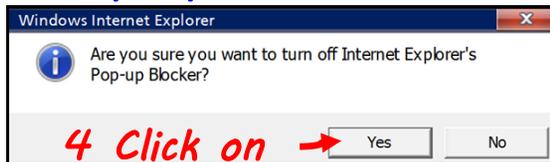
Option 1:

1. From an [internet page](#)
2. Turn off pop-up blocker
 - a. **Click on** Tools
 - b. **Click on** Pop-up Blocker
 - c. **Click on** Turn Off Pop-up Blocker
3. Pop-up window **appears**
4. **Click on** Yes

1 Internet Page



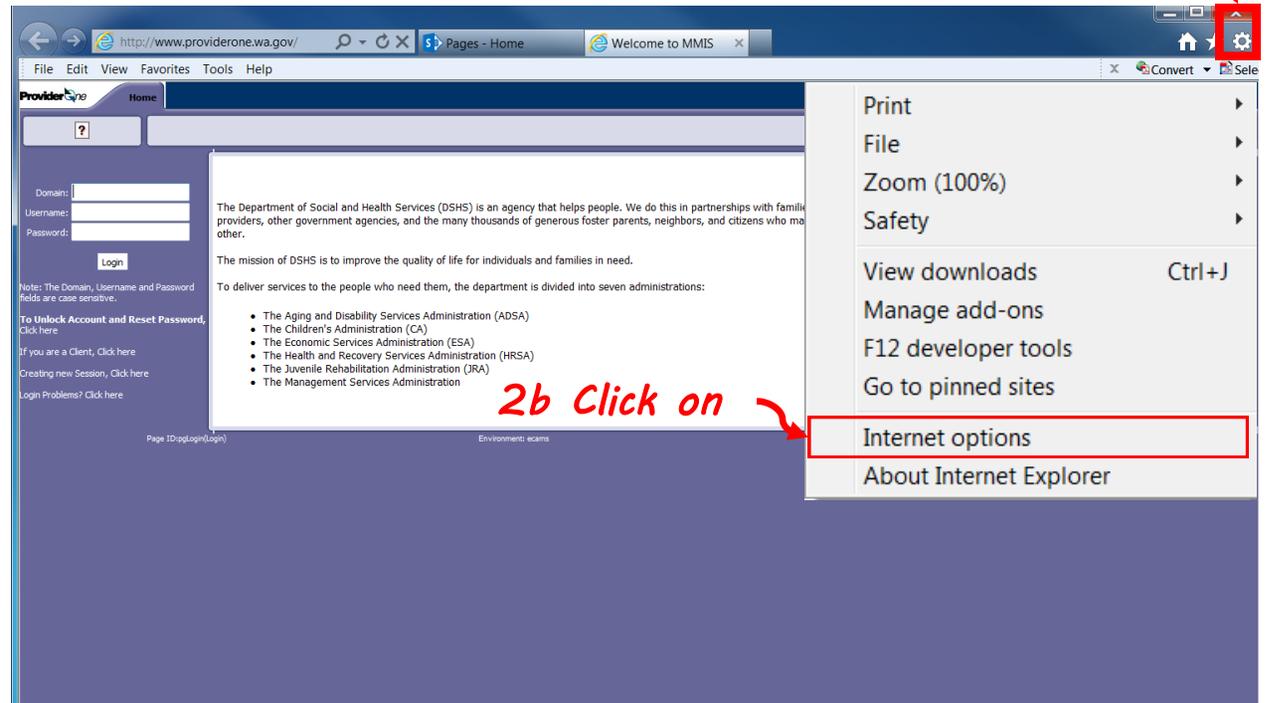
3 Pop Up Window



Option 2:

1. From an [internet page](#)
2. Turn off pop-up blocker
 - a. Click on 
 - b. Click on Internet Options

1 Internet Page



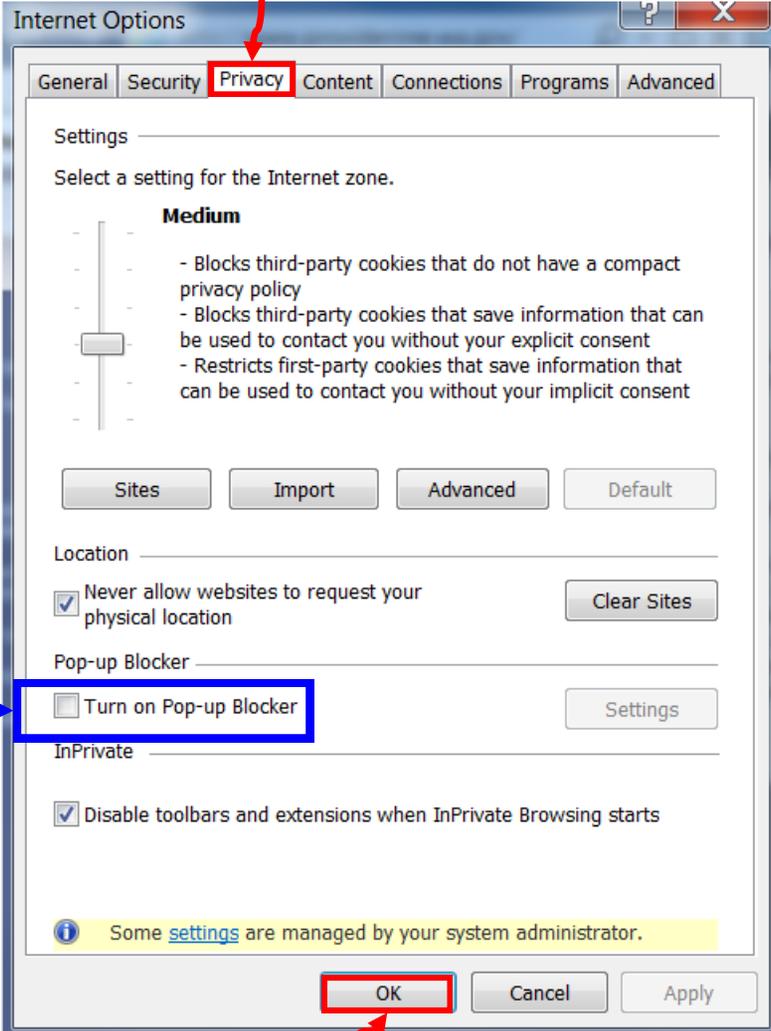
2a Click on

2b Click on

Option 2 (cont.):

- c. Internet Options appears
- d. Click on Privacy
- e. The should be empty.
- f. If the is , click on the box to remove the check
- g. Click on Privacy

2d Click on 2c Internet Options



2e/2f →

2g Click on