PointClickCare®

Session Guide:
Claim Resubmission

After this session, billers will be able to:

- Resubmit adjustments and new claims

- Correct a paid or outstanding claim
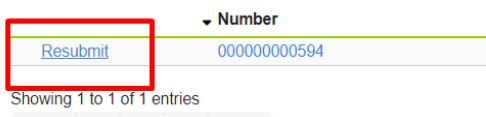
- Void a charge/claim

Resubmission of Adjustment Claims

Use the following procedure to resubmit a claim.

Procedure

1. Go to **Agency > Billing Queue**.

2. For the claim you want to work with, go to **Actions** and click **Claim**.
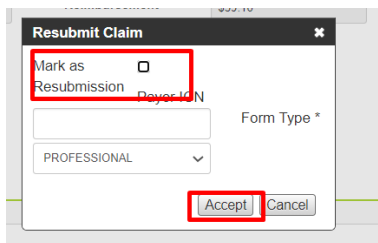
3. For the Invoice, click **Resubmit**.

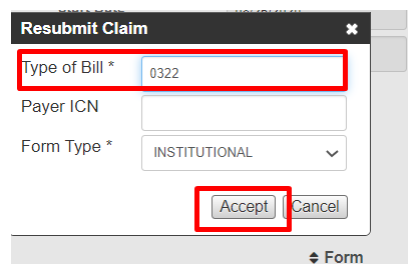**To resubmit as NEW claim 1500 Professional**

Uncheck the **Marked as Resubmission** option and click **Accept**. The claim will then move from outstanding to pending where it will await export and create the 837 files

To resubmit as NEW claim UB Institutional

Change the Type of Bill back to original and click **Accept**. The claim will move from Outstanding to Pending status, where it will await export and create the 837 files.

Correcting an outstanding claim

At times, an outstanding claim may need corrections. Use this procedure to make any changes to rates, occurrence, condition, value codes or spans to an outstanding claim. The claim must be in the **New** status to **add/edit** or make any applicable changes to the original claim.

Procedure:

1. Go to **Agency > Billing Queue**.

2. For the claim you want to work with, go to **Actions** and mark as **New**.

3. Locate the claim that needs adjustment and select **Actions > Claim** or **Charges** (depending on what you need to edit). Make any necessary changes and click **Accept**.

   If you are resubmitting a bill, change the type of bill and add the ICN (Internal Control Number) number. Enter your changes and click **Accept**.

4. In the Billing Queue, select **Submit** from the **Actions** or **Bulk Action** menu.

   Tip: Charge or Payer related adjustments *If the adjustments involve charges or payer changes, best practice is to go back to the appointments to correct the issue rather than doing it directly on the claim.*

   - When you click **Submit**, the claim moves to the **Pending Claims** status where it will await export and create a new 837 file. A new claim number is generated, and the old claim number is closed.

   - If the claim passes the internal quality check scrubbing process, the claim will move from the **Pending** status to the **Outstanding** status**,** and the system will send the new claim to the **Download Claim Files** queue for the claim to be resubmitted to the payer.

5. Forward the Batch File to the Payer from **Download Claims Files** Queue.

Correcting a paid claim

At times, a paid claim may need corrections. Use this procedure to make any changes to rates, occurrence, condition, value codes or spans to an outstanding claim. The claim must be in the **New** status to **add/edit** or make any applicable changes to the original claim.

Procedure:

1. On the client's **Financial Record** tab go to the **Claims** and filter to display only Paid claims.

2. Locate the claim and select **Claim** from the **Actions** menu.

3. Click **Resubmit**. Note that this will move the claim the Pending status.

4. Navigate to Financial Record > Claims. Filter to display claims in the Pending status.

5. Locate the claim and select **Remove from pending** from the **Bulk Actions** menu. This action moves the claim to a Rejected status.

6. Filter the claims to display **Rejected** claims.

7. Locate the claim and select **Mark as new** from the **Actions** menu.

8. Make any required edits and resubmit the claim.

Correcting a duplicate claim

At times, a duplicate claim may show up in your database, this is typically due to missing appointment charges from in the original claim. Use this procedure to merge the two claims and resubmit/correct. The claim must be in the **New** status to **add/edit** or make any applicable changes to the original claim.

Procedure:

1. On the client's **Financial Record** tab go to the **Claims** and locate the original claim.

2. Select **Claim** from the **Actions** menu → More → select **Mark as New.**

3. Select **Charges** from the Actions menu, make any edits necessary to the original claim, click **Accept**.

   Note: if the duplicate claims are differing dates, the dates on the claims need to be updated to match the span of time you are billing.

4. Navigate back to the Claims tab, locate the duplicate claim.

5. Select **Charges** from the Actions menu, scroll down the claim screen to where the charges are displayed.

6. Use the select all action and select **all charges** that need to be moved.

7. Once all charges are selected, click the **Actions** button, and select the option **move selected charges**, a dialog pop up will appear to give the user options of where to move the charges to.

Note: For PDGM claims a HIPPS code and a Q code most likely exist on both the original and the duplicate claim, confirm the accuracy of the codes and void (using the void charge workflow) the duplicate HIPPS and Q codes, these charges do not get moved, you only need one of each on the claim for submission.

8. Select **Move to Existing Claim** and select the original claim from the drop-down list and select **Accept**. All charges selected will now be present on the original claim.

9. Navigate back to the claims tab and delete the shell of the duplicate claim by selecting **More** under the Actions Menu → **Delete**. This action will leave only the original claim.

10. Take the original claim and resubmit per the payer's policy, if a resubmission claim is needed you want to change the TOB (Type of Bill) and include the claim ICN (Internal Control Number) for reprocessing.

Voiding a charge/claim

At times you may need to void a claim, delete a charge, or potentially regenerate a claim. In most cases to void or regenerate a claim all charges need to be deleted first.

Procedure:

1. On the client's **Financial Record** tab, go to **Claims** tab, select **Charges** to the right of the claim you are wanting to edit.

2. Locate the charges on the claim and select the charge line item you want to delete by checking the box.

3. Click **Actions→Void Charges** to delete the charge.

4. Enter the **Void Reason**, select **Accept** to save. (If you are needing to delete the entire claim continue to Step 5, otherwise the procedure is complete).

5. Navigate back to the **Claims** tab, locate the claim, go to **Actions➔More**, select **Delete**. A warning will appear if you attempt to delete a claim that has charges, payments, or adjustments attached to it.

   Tip: If you delete charges and void a claim to regenerate a claim, you **MUST** rereview all appointments within the billing period.

Useful Reports:

- Claims Information