CLAIM EDITING

All charges that are entered into SequelMed must move through the Claim Editing bucket before they can be submitted. The Claim Editing window 'scrubs' each claim looking for two distinct categories of edits/checks:

- Internal rule checking - The internal claim scrubbing mechanism checks for things like "Date Signed", "Accept Assignment", Missing Referring Provider criteria, etc. It also checks for all plan procedure regulations like Prior Authorization Number, Global Period violation), and Provider PIN relation at the Profile level.

- External Claim scrubbing - The external claim scrubbing mechanism within SequelMed checks for correct coding initiatives, such as modifier appropriateness. For the complete list of external claim edits, please refer to the Plan Edit Link profile.

To begin the Claim Editing process:

- Click on the Batch menu
- Click on Claim Editing
- Or use the F5 function key

Required Fields	Hot Keys
There are no required fields in this window	Y – Entered By A – Account # N – First Name M –Last Name C – Practice O – Location L – Plan S – Select All W – View Submit Button T – Visit Detail Button E – Set Edit Button F – Find Button P – Print Button H – Help Button X – Exit Button

When you open the Claim Editing Window you have the option to search by:

- Entered By - This field allows you to search by user name.

- Account # - This field allows you to search by patient account #.

- First Name - This field allows you to search by the patient's first name. Please note that if you do not know the correct spelling of the patient's first name, you can search using the first few letters of the patient's first name.

- Last Name - This field allows you to search by the patient's last name. Please note that if you do not know the correct spelling of the patient's last name, you can search using the first few letters of the last name.

- Transferred Visits - This flag allows you to drill down on the type of claim you are looking at. You have the option of looking at just the primary visits, just the transferred visits (i.e. transferred from one plan to another), or looking at all visits. Please note that SequelMed always defaults to Transferred Visits: All.

- Resubmitted - This flags allows you to drill down on the type of claim you are looking at. You have the option of looking at only resubmitted visits (Yes), visits that have never been submitted (No), or all visits regardless of whether or not they have been submitted or resubmitted). Please note that SequelMed always defaults to Resubmitted: All.

- Claim Type - This flag allows you to specify the type of claim you are looking at. You have the option of looking at only claims flagged to be sent electronically, only claims that are flagged to drop to paper, or both paper and electronic claims. Please note that SequelMed always defaults to Claim Type: All.

- Suspend - This option allows you to view claims that have been flagged as suspended.

- Practice - This home key driven field allows you to search by practice short name.

- Location - This home key driven field allows you to search by location short name.

- Provider - This field allows you to search by provider short name.

- Plan - This field allows you to search by plan short name.

Once you have specified your search criteria, you can hit the find button. SequelMed will retrieve all of the rows that match the parameters specified. At this point, the visits can be selected collectively or on an individual basis, and the Check Edit button must be hit to scrub the claim's for missing information, claim errors, and/or warning (based on the parameters specified in the Plan Edit Link).

Buttons

- Check Edit: This button will scrub the selected claims for any missing, warning, or error information. Please note that SequelMed will specify the appropriate missing, warning, or error information based on the parameters set in the Plan Edit Link profile.

- Set Edit: The set edit button will move the claims into the appropriate bucket for submission. Please note that these claims will only move through the bucket if they are 'clean' claims; meaning they do not have any errors, they are not missing any critical data, and they don't have any warnings specified. Additionally, there is a Batch Status flag (within the Security Application) which will determine if claims within a batch can be moved through the bucket or sit in the bucket until the batch is closed.

- Clear Edit: The clear edit button allows a user to override the warning messages that may be indicated on the claims and push them through claim editing into the appropriate bucket for submission.

- Select Patient: This button will allow you to select a patient, moving his/her name into the title bar, so that the user can easily access additional information about the patient (i.e. short-cut icons).

- View Submit: This button allows you to view all the information as displayed on a paper form. Additionally, this window provides a shortcut to some of the profile tables (i.e. Practice, Location, Provider PIN).

- Cancel Submit: If you have resubmitted a claim that is now back in the claim editing bucket, you can remove it by highlighting the claim and hitting the Cancel Submit button. SequelMed will automatically refresh the window and remove the claim from the found data.

- Set Eligibility: This feature allows a user to select claims on an individual basis or collectively and queue them into a bucket to check eligibility status. By selecting the claims and hitting the Set Eligibility button, Sequel will display a message stating 'Eligibility added for 'X' Patient Plans'. Please note that the plan has to be set up with the correct eligibility insurance and the DOS has to be greater than the last eligibility date, otherwise the claim/s will not move into the queue.

- Visit Detail: This button allows you to see the visit detail window. Here you can add/modify information that is sent to the vendor. (I.e. Referring Provider, Date Last Seen)

- WC/NF: This button will display the NF3 or C4 form specific to the date of service.

- Consolidate: The consolidate button allows a user to consolidate claims. For example, if

- Suspend: This button allows you select claims on an individual basis or collectively and suspend them. Please note that once a claim is suspended it will not move out of the Claim Editing bucket. Additionally, the visit will be outlined in the color pink as a visual reminder that the claim is suspended.

- Un-Suspend: This button allows you to select claims on an individual basis or collectively and un-suspend them at one time so that they can be pushed into the appropriate bucket for submission.

- Find: This button will find all of the data based on the specified search parameters.

- Print: This button will print out a screenshot of the Claim Editing Find Criteria window.

- Help: This button will display the help menu specific to the window you are in.

- Exit: This button will close the Claim Editing Find Criteria window.

Columns

- Visit Date: This column indicates the Visit Date.

- Account #: This column indicates the patient Account # as specified in the Patient Demographic window.

- Plan Id: This column indicates the Plan Id for the patient as specified in the Patient Demographic window.

- Location: This column indicates the Location where the services were rendered.

- Provider: This column indicates the Provider who performed the services.

- Plan: This column indicates the Plan associated with the date of service.

- Missing: This column indicates any Missing information (i.e. Plan ID invalid, PIN Required,). Please note that the Missing messages are hard coded into the application and do not appear in the Plan Edit Link. Additionally, the claim/s in question will not move through the bucket unless the missing information is added. For the complete list of Missing Edits, please refer to Appendix A.

- Warning: This column indicates any Warning/s that may be associated with the visit (based on the parameters set in the Plan Edit Link). Warnings appear in pick and can be viewed in their entirety by double clicking on the visit. Once the user has opened the Visit Detail window and has seen the Warning message displayed in its entirety, he/she can better determine if the visit/charge should be modified or if the warning should be ignored.

- Errors: This column indicates any Errors associated with the visit (based on the parameters set in the Plan Edit Link). Errors appear in red and must be fixed before the claims can be moved into the appropriate bucket for submission. To view the complete Error message, a user can double click on the visit. Within the Visit Detail window a Claim Edit Message window appears containing the Error message in its entirety.

- Last Name: This column indicates the Last name of the patient.

- First Name: This column indicates the first name of the patient.

- Plan Amt: This column indicates the Plan Amt for the visit.

- Balance: This column indicates the balance for the visit.

- Entered By: This column indicates the user that entered the charges.

- Date Entered: This column indicates the date that the charges were entered in SequelMed.

- Plan Edit: This column indicates which Plan Edit Link

- Batch Status: This column indicates the status of the charge batch (i.e. Open, In Process, Completed, None). Please note that if the Batch Status appears in red, the visit will remain in the Claim Editing bucket until the Charge Batch is closed (as defined in the Security Application).

Appendix A

Missing Column Edits

- Plan Id invalid
- Patient DOB greater than today
- Suspended
- Pin Required
- Bad Address on file
- Eligibility
- Visit date is before insured DOB
- Invalid DOB
- Referring Provider UPIN missing