

7B. WORKING WITH OPEN CLAIMS

A. Editing an Open Claim

The MPM Office program allows the user three different ways to get to the **Edit Claims Data** screen to edit an existing Claim for a Patient:

1. Getting to the Open Claim

(a) Through the Patient Record

- a) After you've selected your Patient from the **"Patients Data"** screen, click on the **"Claims"** box to open the **"Claims Data For"** screen showing all existing opened Claims for this Patient.
- b) Double-click on the claim you want to edit to open the **"Edit Claims Data"** screen.
- c) Make your changes to the claim as needed.
- d) Click on the **"Save"** button to return you to the **"Claims Data For"** screen, then click the **"Close"** button to return you to the **"Patients Data"** screen.

(b) From the "Charges" Icon

- a) From the **Left Navigational Menu**, click on the **"Charges"** Icon to open the **"Claims Data"** screen.
- b) Double-click on the Patient's Name and Claim you want to edit to open the **"Edit Claims Data"** screen.
- c) Make your changes to the claim as needed.
- d) Click on the **"Save"** button to return you to the **"Claims Data"** screen, then click the **"Close"** button when done.

(c) From the "Claims" selection on the Top Navigational Menu

- a) From the **Top Navigational Menu**, click on the word **"Claims"** and then choose the word **"Claims"** again from the menu that opens.
- b) From the opened **"Claims Data"** screen, double-click on the Patient's Name and Claim you want to edit to open the **"Edit Claims Data"** screen.
- c) Make your changes to the claim as needed.
- d) Click on the **"Save"** button to return you to the **"Claims Data"** screen, then click the **"Close"** button when done.

2. Editing or Deleting Entries in an Open Claim

(a) **Editing the entered Procedures**

- a) From the opened “**Edit New Claims Data**” window, left click on the line entry you want to edit, and then click on the “**Edit**” button under the word “**Procedures**” to open the “**Edit New Transaction Data**” form.
- b) Make the appropriate changes, then click the “**Save**” button to return to the “**Edit New Claims Data**” window.
- c) Click the “**Save**” button to return to the “**Edit Patient Data**” window.

(b) **Deleting the entered Procedures**

- a) From the opened “**Edit New Claims Data**” window, left click on the line entry you want to edit, and then click on the “**Delete**” button under the word “**Procedures**”.
- b) If you are certain that you want to delete this Procedure, click “**Yes**”.
- c) Continue to either add a new Procedure (by clicking on the “**Add**” button under the word “**Procedures**”), or finish by clicking the “**Save**” button to return to the “**Edit Patient Data**” window.

B. Using the “Repeat Procedures” Option

If you have already entered a claim for a Patient and your doctor is treating the Patient for the **same conditions** using the **same Procedure Codes and Diagnosis Codes** as the last service date the doctor saw this Patient, you can save time in entering future claims for this Patient by doing the following from the opened “**Edit Patient Data**” screen:

- a) Click on the “**Add Claim**” button.
- b) In the opened “**Edit New Claims Data**” screen, complete the General Information (Top Portion), and the Anesthesia Information (Middle Portion), as needed.
- c) Click on the “**Repeat Procedures**” button, and in the “**Repeat Procedures, New Claim**” screen, change the Date of Service (**DoS**) field to reflect the correct service date.
- d) Click the “**Save**” button when done to return you to the “**Edit New Claims Data**” screen.
- e) Review the entered Procedures. Click the “**Edit**” button to edit any entries made, or the “**Delete**” button to remove an entry made. If everything is correct as entered, click the “**Save**” button to return you back to the “**Edit Patient Data**” screen.

C. Entering a Payment and/or Adjustment from Within the Open Claim

If you want to post a Payment and/or Adjustment to a Charge (Claim) you just created, you can click on the “**Pay & Adj**” button at the bottom of the opened “**Edit Claims Data**” screen. You will **only** use this feature under the following circumstances:

1. Patient pays you (partial or in full) for the services rendered when they have no insurance or if you do not accept their insurance.
2. Patient pays you their co-insurance in advance of their insurance being billed.
3. You are applying a previously collected co-payment.

You **would not** use this feature to apply insurance payments received after the claim has been billed as the reports will not calculate correctly.

At the bottom of the opened “**Payments and Adjustments**” screen, click the “**Add**” button to open the “**Edit New Pays and Bills**” screen, enter the Payment or Adjustment you want to apply. If you are entering a Payment or an Adjustment only, click the “**Save**” button when done. If you entered a Payment and also need to apply an Adjustment, click on the “**Save & Adj**” button when done.

When you are done making all entries, click on the “**Save**” button to return back to the opened “**Payments and Adjustments**” screen, then click the “**Close**” button to return to the opened “**Edit Claims Data**” screen. Finally, click on the “**Save**” button to return back to the Patient Record.

D. Printing the HCFA/CMS 1500 Claim Form from Within the Open Claim

To print a **Claim Form** from within an open claim, click on the “**Print**” button at the bottom of the opened “**Edit Claims Data**” screen.

From the opened “**Select Print Type**” screen, click in the option box labeled “**HCFA 1500 Report**”, and then click on the “**Continue**” button. In the opened “**Report HCFA 1500**” screen, select the appropriate **Settings** from the drop down menu provided. Check the **Print Background** box if needed, and then click on the “**Print**” button at the bottom of the screen.

In the opened “**Print**” screen, select the **Printer Name** from the drop down menu provided, adjust the printer’s **Properties** as needed (by clicking on the “**Properties**” button), confirm the printing of “**All**” pages as the **Print Range** selection (or choose any other range as needed), enter the number of **Copies** in the field provided, and click the “**OK**” button when ready.

Click on the “**Close**” button when done printing, and then click the “**Save**” button to close out of the opened “**Edit Claims Data**” screen.

E. Printing the Patient Statement from Within the Open Claim

To print a **Patient Statement** from within an open claim, click on the “**Print**” button at the bottom of the opened “**Edit Claims Data**” screen.

From the opened “**Select Print Type**” screen, click in the option box labeled “**Statements Report**”, and then click on the “**Continue**” button. In the opened “**Report Statements**” screen, select the appropriate **Settings** from the drop down menu provided, and then click on the “**Print**” button at the bottom of the screen.

In the opened “**Print**” screen, select the **Printer Name** from the drop down menu provided, adjust the printer’s **Properties** as needed (by clicking on the “**Properties**” button), confirm the printing of “**All**” pages as the **Print Range** selection (or choose any other range as needed), enter the number of **Copies** in the field provided, and click the “**OK**” button when ready.

Click on the “**Close**” button when done printing, and then click the “**Save**” button to close out of the opened “**Edit Claims Data**” screen.