

Claims Quick Guide



Claims Tab under the Accounting Module displays claims and features a function to submit claims. The Claims tab defaults to Basic Search where Advanced Search allows a more detailed Search. The Basic Search default is Submit Status: Ready to Submit, Submit Method: Electronic.

To select a batch of claims check the “box” in the first column header to select all claims. Uncheck any claims that are not ready to submit or do not want submitted.

ID	Claim Date	Invoice ID	Invoice Date	Service Date	Insurance	Priority	Patient Name	Amount Due	Submit Status	Submit Date	Submit Method
98406639	02/20/2023	206827682	02/20/2023	02/20/2023	Medicare	Primary	Testing_Jane	\$300.00	Ready to submit		Electronic
98819975	03/01/2023	207685177	03/01/2023	03/01/2023	Medicare	Primary	Test_Patient	\$100.00	Ready to submit		Electronic
99276886	03/10/2023	160779985	07/27/2021	07/27/2021	High Tower Insurance	Primary	Test_K	\$6,778.87	Ready to submit		Electronic
99696038	03/21/2023	162184302	08/13/2021	08/13/2021	Happy Insurance	Primary	Pear_Amy	\$183.00	Ready to submit		Electronic
100322414	04/04/2023	166748016	10/13/2021	10/13/2021	Dark Knight Ins	Primary	Test_Patient	\$130.00	Ready to submit		Electronic
100460716	04/06/2023	177021390	02/23/2022	02/23/2022	Happy Insurance	Primary	Test_Patient	\$138.00	Ready to submit		Electronic
101010596	04/19/2023	212189200	04/04/2023	04/04/2023	BlueSky	Primary	Mustard_Kernel	\$138.00	Ready to submit		Electronic

Click within the “Action” box to View the Function list.

To send claims to a clearinghouse choose Function: Submit

ID	Invoice ID	Invoice Date	Service Date	Insurance	Priority	Patient Name	Amount Due	Submit Status	Submit Date	Submit Method
98406639	206827682	02/20/2023	02/20/2023	Medicare	Primary	Testing_Jane	\$300.00	Ready to submit		Electronic
98819975	207685177	03/01/2023	03/01/2023	Medicare	Primary	Test_Patient	\$100.00	Ready to submit		Electronic
99276886	160779985	07/27/2021	07/27/2021	High Tower Insurance	Primary	Test_K	\$6,778.87	Ready to submit		Electronic
99696038	162184302	08/13/2021	08/13/2021	Happy Insurance	Primary	Pear_Amy	\$183.00	Ready to submit		Electronic
100322414	166748016	10/13/2021	10/13/2021	Dark Knight Ins	Primary	Test_Patient	\$130.00	Ready to submit		Electronic
100460716	177021390	02/23/2022	02/23/2022	Happy Insurance	Primary	Test_Patient	\$138.00	Ready to submit		Electronic
101010596	212189200	04/04/2023	04/04/2023	BlueSky	Primary	Mustard_Kernel	\$138.00	Ready to submit		Electronic

Note: Integrated Clearinghouse: Submit function will upload an 837 Electronic claim file directly to the clearinghouse
Unintegrated clearinghouse: See Note in Article [Using an Unintegrated Clearinghouse](#)

E-Claims tab displays rejected claims information*

The Basic Search defaults to rejected claims. This is where you can view, correct and mark the corrected claim for resubmit.

*E-Claims tab only displays for RevClear integrations and grandfathered Trizetto integrations

Video: [Rejected E-Claims for Trizetto](#)