

Claim / Remit Reconciliation

Overview

The Claim/Remit Reconciliation feature allows the user to review claims and remittances within the same user interface. Searches may be performed on claims and remittances for linking. By clicking on the specific claim as well as the specific remittance in the search results, a pop up viewer will display showing both the claim and the remittance side by side. Additionally, a linking dialog box will display and allow the user to link the claim and remit, clear the selection or start over.

Search Claim & Search Remittance Sections

The Search Claim and Search Remittance sections allow the user to search for claims and remittances using any of the filters available. Click the Search button to invoke the search on each section.

The image shows two search forms. The top form is titled "Search Claim" and includes fields for Patient Control #, Patient Last Name, Patient First Name, Link Status (set to "UnLink"), and a Search button. Below these are fields for DOS From, Thru, Total Charge From, Thru, and Import Date From, Thru. The bottom form is titled "Search Remittance" and includes similar fields for Patient Control #, Patient Last Name, Patient First Name, Link Status, and a Search button. Below these are fields for DOS From, Thru, Deposit Date From, Thru, Total Charge From, Thru, LockBox ID, Batch ID, and Subscriber ID.

Results of Search

The results of the searches will display once the Search button is clicked. By clicking on a claim and then a remittance, a side by side viewer will pop up that displays both the claim and remittance that were selected.

The image shows search results for claims and remittances. The top section is titled "Search Claim" and displays a table with columns: PCN, Patient Name, Total Charge, Dos, Payer, Linked, and Link. The bottom section is titled "Search Remittance" and displays a table with columns: Lock Box Id, Patient Control, Patient Name, Subscriber ID, Total Chg, DOS, Payer ID, RA Date, Payment Da, CLP, ICW/DCN, and Link.

| PCN | Patient Name | Total Charge | Dos | Payer | Linked | Link |
|-----|--------------|--------------|---------------------|-------------------------------------|--------|----------------------|
| P | | \$175.00 | 11/09/10 - 11/09/10 | SCOMM UNITED HEALTHCARE | | Link |
| P | | \$153.00 | 07/15/10 - 07/15/10 | 31114 CARESOURCE ADVANTAGE | | Link |
| P | | \$153.00 | 05/03/11 - 05/03/11 | SMOHO MEDICARE SECONDARY PAYER DEPT | | Link |
| P | | \$102.00 | 05/25/11 - 05/25/11 | 61101 HUMANA MEDICARE | | Link |
| P | | \$574.00 | 05/25/11 - 05/25/11 | SMOHO MEDICARE | | Link |
| P | | \$153.00 | 05/25/11 - 05/25/11 | SMOHO MEDICARE | | Link |
| P | | \$1,674.00 | 05/25/11 - 05/25/11 | SMOHO MEDICARE | | Link |
| P | | \$417.00 | 05/22/11 - 05/24/11 | SMOHO MEDICARE | | Link |
| P | | \$1,348.00 | 05/25/11 - 05/25/11 | SMOHO MEDICARE | | Link |
| P | | \$153.00 | 05/25/11 - 05/25/11 | 29076 MEDICAL MUTUAL | | Link |

| Lock Box Id | Patient Control | Patient Name | Subscriber ID | Total Chg | DOS | Payer ID | RA Date | Payment Da | CLP | ICW/DCN | Link |
|-------------|-----------------|--------------|---------------|-----------|------------|----------|---------|------------|-----|---------|----------------------|
| | | | | \$210.00 | 06/08/11 - | LBW252 | | 07/05/2011 | | | Link |
| | | | | \$210.00 | 06/08/11 - | LBW252 | | 07/05/2011 | | | Link |

Linking Dialog

After selecting a claim and a remittance for viewing and potential linking, the pop up will display the items side by side. Additionally, a linking dialog box will display allow the user to link the two by clicking

the "Link Claim with Remittance" button or to clear the entry by clicking the "Clear Selected Entry" or begin the search again.

The screenshot displays a web application interface for linking claims and remittance. It consists of several overlapping windows and panels:

- Link Claim/Remittance Window:** A table with columns: Patient Control, Patient Name, Total Cha, Date Of Service, Payer Name, and Link Status.

| Patient Control | Patient Name | Total Cha | Date Of Service | Payer Name | Link Status |
|--------------------------------|--------------|-----------|---------------------|-------------------------------------|-------------|
| Claim To Be Linked | | | | | |
| | | | 05/25/11 - 05/25/11 | SMOHO MEDICARE | UnLinked |
| Remittance To Be Linked | | | | | |
| | | \$210.00 | 06/08/11 - | WHIRLPOOL CORPORATION BENEFIT TRUST | UnLinked |

 Below the table are buttons: "Link Claim With Remittance", "Clear Selected Entries", and "Repick Claim/Remittance".
- Search Remittance Window:** A search form with fields for "Patient Control #", "DOS From" (05/01/2011), "Lock Box Id", and "Patient Name".
- Display Claim and Remittance For Linking - Windows Internet Explorer:** A browser window showing the URL <https://qa.medi.com/FTB/view/claimRemLinkFrame.jsp>. It displays two side-by-side panels:
 - Claim Sequence 894:** A detailed form titled "HEALTH INSURANCE CLAIM FORM" with various fields for patient information, dates, and medical details.
 - Remittance Sequence 114508793:** A table showing remittance details.

| LINE | DATE | TYPE | CODE | AMOUNT | REASON | REMARKS |
|-------------|------------|------|------|--------|-----------|-----------|
| 1 | 2011-05-25 | 8070 | 1 | 422.00 | ADJ. AMT. | ADJ. AMT. |
| 2 | 2011-05-25 | 8070 | 1 | 422.00 | ADJ. AMT. | ADJ. AMT. |
| CLEAR TOTAL | | | | | | |
- Main Table:** A table on the right side of the browser window with columns for "Linked" and "Link". It contains multiple rows, each with a "Link" button.