

Create Medicare Claims in Bulk

BETA version

New for version 2018.0 is the ability to create your Medicare claims in a bulk. Once you have all of your information (PPS assessments are done so you have RUGs for your billing days, therapy information has been processed through ancillaries, any other ancillaries charges have been processed) and are ready to do your traditional Medicare claims, you may create all of the claims in bulk. Each claim will be put on hold until you review, correct, and release them for submission.

Billing – Medicare – Bulk Create Claims

Be sure you have a current census and have set billing dates. Then run this program. It will create Medicare claims for all residents with Medicare charges during the time period you have set. Each claim will have a HOLD status and will import all of the information that is in the system at this moment.

Once the claims are created, you can get a report using **Medicare – Report on Claims not yet Submitted**. Enter in your date range and select MEDICARE as the insurance option. You can either view all claims, only those on hold, or only those that are ready to be submitted.

Working from the report, review, update, correct, etc. each of the claims through the menu option **Medicare – Create UB-04 Submission Data**. When each claim is ready for submission, be sure to remove the HOLD flag on the claim. A tick in the box means it is on hold (green box in the illustration below). Remove the hold to place the claim into a submission file.

The screenshot shows a software window titled "Medicare Claim for" with a subtitle "TOB: 213 from 02/01/2017 through 02/28/2017". The window has several tabs: "Demographics", "Various Codes", "Claim Detail", "Insurance", "Diag/Proc/Phys", and "Remarks/FL 81". The "Demographics" tab is active, displaying a form with the following sections:

- Provider Information:** Name: PNP DEMO HOUSE; Address: 66 MAIN STREET; City/State/Zip: BROCKPORT NY 14420; Telephone/Fax: 5856373240 5855555678; Federal Tax No: 163456789; NPI: 2226119744.
- Patient Information:** Name: [Redacted]; Address: 66 MAIN STREET; City/State/Zip: BROCKPORT NY 14420; Med. Rec. #: CAU8765; Birthdate: 03/22/1940; Sex: M.
- Admission Information:** Date: 08/20/2013; Time: 0000; Type: 9; SRC: 9.
- Discharge Information:** Time: [Redacted]; Status: 30.
- Statement Information:** Type of Bill: 213; Statement From: 02/01/2017; Thru: 02/28/2017.
- Document Information:** Control #: 20180123140302698; Claim for: Medicare; Hold Claim: (highlighted with a green box).

At the bottom of the window are buttons for "Previous", "Next", "Finish", and "Cancel".

You can **Create UB-04 Disk from Data** submission file however you wish – small batches as completed or waiting until all are completed and no longer on hold. Use the Report on Claims not yet Submitted for Medicare to be sure that you have reviewed and submitted them all.