

## Open Claim Report Request

### What is the Open Claim Report Request Function?

The Open Claim Report is used to identify and report or submit unpaid claims. Selection criteria is based on claims for all or selected insurance companies, within a specified date range, based on a minimum balance and all or specific providers.

### How do I request an Open Claim Report?

From Main Menu #1, hit your down arrow or Enter key to navigate to Main Menu #2. Select PF1, Insurance Services Menu and hit your down arrow or Enter key to navigate to Insurance Services Menu #2. Hit PF1 for Open Claim Reporting.

#### Shortcut:

From any menu, type 2.1.2.1 and hit Enter.

You are presented with an options menu, “A D S E Enter Option: \_\_\_\_”

- 1) Press “A” to Add Open Claim Request and hit Enter.
- 2) At “<R>eport or (C)laims”, hit Enter.
- 3) At “<A>ged or by Patient (N)ame”, hit Enter.
- 4) At “Insurance Code \_\_\_\_”, enter an Insurance Company code or “\*” for ALL insurances.
- 5) At “Exclude Insurance Code \_\_\_\_”, hit Enter.
- 6) At “Start Selection Date \_\_\_\_”, enter a starting date for the report or leave blank to start from the beginning of time.
- 7) At “End Selection Date \_\_\_\_”, enter an ending date or leave blank to end with today. (We recommend an end date of 60 days prior to “today”)
- 8) At “Minimum Balance #####”, hit Enter. (Unless you are only following up on claims greater than a certain dollar amount, ie claims over \$500.00)
- 9) At “Maximum Balance #####”, hit Enter. (Unless you are only following up on claims less than a certain dollar amount, ie claims under \$500.00)
- 10) At “Specific Provider”, hit Enter to select ALL your practice providers or enter a practice provider number to select a specific provider’s claims only.
- 11) At “Ok to Add (<Y>es or (N)o) ?”, hit Enter unless you wish to change your selected options.
- 12) At this point, you are again presented with “Include Insurance Code \_\_\_\_” – if you are finished with your request, hit Enter. If you are selecting a few insurance companies, continue by entering the next insurance code desired and go up to step 5.
- 13) At “Enter an Optional Heading for Report”, you may enter up to 79 characters to include a unique heading for this report. For instance, typ in “route to Linda” and hit Enter. If you do not require any special notes, simply hit Enter.
- 14) At “Submitted to batch”, hit Enter.

Your report will be produced and placed in Printer Services for you to print in a few minutes.

This is an example of how the report will be shown in Printer Services: