

Resubmit Multiple Claims (maketags)



The Physician's Computer Company

support@pcc.com
1 Main Street, Suite 7
Winooski, VT 05404
(800) 722-7708 Admin
(800) 722-1082 Support

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PRINTING INSTRUCTIONS: To print out copies of this document, browse to *Resubmit Multiple Claims (maketags)* (<http://learn.pcc.com/maketags.pdf>) to download a PDF formatted version. Then select the "File" menu and choose the "Print" option. If you have trouble opening and printing the PDF, please contact PCC support at <support@pcc.com> or (800) 722-1082.

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1. Introduction

Resubmit HCFA Forms (**maketags**) is an insurance billing program that finds and rebatches large groups of unpaid or paid claims.

You can rebatch and print any *single* claim, for any charge, from the Correct Mistakes (**oops**) program. Sometimes, however, you need to resubmit all of the claims for a certain insurance group, a specific date range, or all of the claims containing a certain procedure. **maketags** is a powerful tool for recreating claims based on a wide variety of criteria.

Sample Problems for maketags

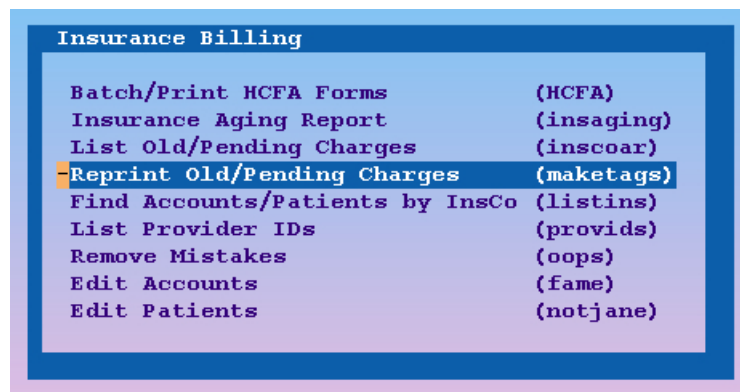
- You have used the wrong tax ID number for the last three weeks of claim submissions. You receive the rejections, you correct the number in Partner, and now you need to resubmit every claim from the last three weeks.
- You have been working with an insurance company that has denied claims improperly. They have asked you to resubmit all claims for visits by their patients between January and October of last year.
- You have billed a procedure using the wrong CPT code. After correcting the code in the Table Editor (**ted**), you need to find every claim that had this procedure and resubmit the entire claim.

2. Quickstart: Running maketags

You can run **maketags** and resubmit charges quickly and easily. Follow the four-step procedure below, and read the sections that follow to learn more.

1. Run maketags

Run the **maketags** program from the Insurance Billing window of the Billing Functions window in your Partner Windows. You can also run it from a UNIX prompt by typing **maketags**.



2. Select Search Criteria

Resubmit Multiple Claims (*maketags*)

RESUBMIT HCFA FORMS

Age of Charges:
 45 or more days old
 from 45 to 90 days old
 for dates from 06/23/04 through 06/22/05

Charges to Resubmit:
 Only Unpaid, Pending Charges
 Only Unpaid Charges, Pending or Personal
 All Charges, Paid or Unpaid, Pending or Personal

Which Insurance Plans:
 Many Plans
 Just One Plan: Medicaid

All Providers: Yes

NOTE: the above criteria will be ignored when using F5 (SRS).

Include entire visits: No

Buttons: Generate Report, Restrict with SRS

Use the on-screen options to tell **maketags** which charges you need to resubmit, and press [F1 -- *Generate Report*]. For options such as multiple insurance companies or more than one provider, **maketags** will ask you to make additional selections after you press F1. See the sections below for more information.

3. Optional: Review List of Found Claims

RESUBMIT HCFA FORMS

I found 9 claims to resubmit. The actual number to print may be slightly less due to your configuration.

Press F1 to batch these claims, or F12 to cancel.

Buttons: Generate Report, Show List

Press [F8 -- *Show List*] to review or print the list of claims that **maketags** found.

4. Press [F1 -- *Generate Report*] to Rebatch the Claims

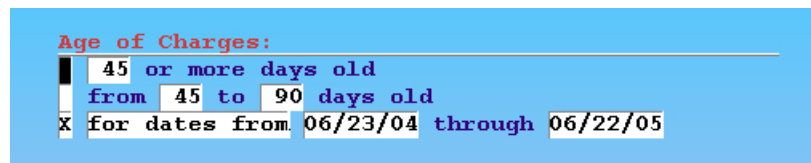
After the claims are batched, you can submit the claims (<http://learn.pcc.com/submitclaims/>) using **preptags-ECS** or **hcfa**.

3. Criteria Selection: Choosing Which Charges to Rebatch

maketags can find and rebatch charges by a wide range of criteria, including age, balance and insurance status, insurance plan, and provider. Read below to learn more about the different criteria you can select from the first screen in **maketags**.

Tip: You can combine several different criteria. For example, you could use the criteria options to tell **maketags** to resubmit all unpaid charges, either pending or personal, with any Aetna insurance company, that is between 30 and 120 days old.

3.1. Rebatch Charges by Age or Date Range

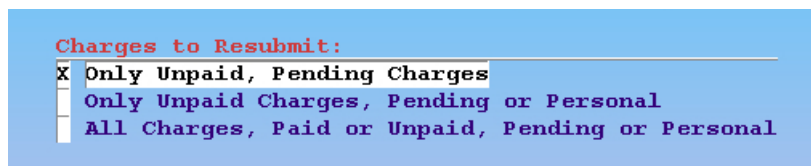


```
Age of Charges:
| 45 or more days old
| from 45 to 90 days old
X for dates from 06/23/04 through 06/22/05
```

Use the "Age of Charges" options to select charges of a certain age. You can enter an age range, in days, using one of the top two options. Or, you can input a specific date range.

3.2. Rebatch Charges by Paid and Insurance Status

Under most circumstances, you only want to recreate claims if they are unpaid and still pending an insurance company. You may occasionally need to create batches for an entire insurance company, regardless of whether or not there is an outstanding balance. Use these settings to select which charges, based on pending and paid statuses, **maketags** will batch:



```
Charges to Resubmit:
X Only Unpaid, Pending Charges
  Only Unpaid Charges, Pending or Personal
  All Charges, Paid or Unpaid, Pending or Personal
```

3.3. Rebatch Charges by Insurance Plan

If you select "Just One Plan," you can choose the insurance plan of the claims you wish to resubmit on the first screen:

Which Insurance Plans:
Many Plans
X Just One Plan: Aetna USHC \$15

If you leave the default of "Many Plans" selected, however, **maketags** will ask you to select the insurance plan or plans when you press [F1 -- Generate Report]:

Which Insurance Plans:
X Many Plans
Just One Plan: Aetna USHC \$15



Select Insurance to Include.
<F1> Continue with Report <F5> Select/Deselect based upon group
<F2> Select/Deselect an item <F6> Select/Deselect based upon part of name

GROUP - BCBS			
BCBS/BOX	9196		
BCBS/BOX	9196	\$10	
BCBS/BOX	9196	\$15	
BCBS/BOX	9196	\$20	
BCBS/BOX	9196	\$25	
BCBS/BOX	9196	\$5	
BCBS/BOX	9209		
BCBS/BOX	9209	\$10	
BCBS/BOX	9209	\$15	
Conn General	\$10/BOX	8988	\$10
Conn General	\$15/BOX	8988	\$15

Process Select Select All Select None List By Group List By Pattern

Press **Page Down**, **Page Up**, or the up and down arrow keys to select the desired plan and press [F2 -- Select] to mark it. If you want to submit claims from all insurance plans, press [F3 -- Select All].

Press [F1 -- Process] after you have selected all the needed plans.

Use Groups: Select the "Group" heading at the top of a list of plans to select the entire group. You can also press [F5 -- List By Group] to view all of your insurance groups. By selecting groups instead of individual plans, you can very quickly pick out the different insurance companies whose claims you need to resubmit.

List By Pattern: Press [F6 -- List By Pattern] to search for a word or number, such as "Aetna" or a PO Box number. You can then select plans from the list of results.

3.4. Rebatch Charges by Provider

You can sort and resubmit charges for all providers or for specific providers. This comes in handy if you use the wrong provider ID# for a period of time and you need to resubmit all the claims from that time.

Change the "All Providers" field to "No" and press [F1 -- Generate Report] to select a specific provider.

All Providers:

↓

Select Providers to Include.

<F1> Continue with Report <F3> Select/Deselect based upon group
 <F2> Select/Deselect an item <F4> Select/Deselect based upon part of name

GROUP - Dr. Blevins
 Mike Blevins, M.D.
 GROUP - Dr. Bugles
 George Bugles, M.D.
 GROUP - Dr. Crusher
 Beverly Crusher, M.D.
 GROUP - Dr. Doom
 Victor Von Doom, M.D.
 GROUP - Dr. Hunter
 Kathy Hunter, M.D.
 GROUP - Dr. McCoy
 Leonard McCoy, M.D.

On the provider selection screen, use the arrow keys and press [F2 -- Select] to pick providers or provider groups. Then press [F1 -- Process] to continue.

3.5. Submit the Whole Visit?

Do you need to resubmit only the unpaid part of a claim, or the entire claim? By default, **maketags** processes charges individually, based on the restrictions you define on the criteria screen. If only one procedure from a patient's visit meets the criteria listed, then only that procedure will be rebatched.

You can ask **maketags** to rebatch the entire date of service instead:

Include entire visits:

Set the "Include entire visits" option to "Yes." If **maketags** finds a qualified charge to process, it will also rebatch *all* other procedures from that same visit, regardless of whether or not the other charges are due or meet the other criteria.

4. Printing Claims Within *maketags*

By default, **maketags** batches all of the charges it finds based on your criteria. You can then submit them using Partner's claim submission tools, *preptags-ECS* and *hcfa* (<http://learn.pcc.com/submitclaims/>).

If you need to print paper HCFA's directly from **maketags**, contact PCC support at 1-800-722-1082 or <support@pcc.com>. PCC support can make configuration changes that enable direct printing, but there may be a better solution to your problem. When you print claims directly from **maketags**, the claims are not processed according to the electronic submission configuration rules and claim errors may result.

With direct paper printing enabled, **maketags** will show you an additional option once charges have been collected:

RESUBMIT HCFA FORMS

I found 9 claims to resubmit. The actual number to print may be slightly less due to your configuration.

What would you like done with these forms?

When to Print:

Print the Forms Now

Add the Forms to the Batch

Generate Report [] [] [] [] [] [] [] Show List

Select "Print the Forms Now" and press [F1 -- *Generate Report*]. You will see the same HCFA printing interface as found in the *hcfa* (<http://learn.pcc.com/submitclaims/>) program. You can select one batch at a time, and you will have the opportunity to print (and test print, if necessary) all of the claims you just batched without leaving **maketags**.

Important: Only the claims that you processed in **maketags** are available on this screen. The batches will not include the current claims located in your normal HCFA batches. Remember, claims printed directly from **maketags** may not receive their insurance specific configuration rules. For best results, use **maketags** to batch all claims and process or print them later using *preptags-ECS* and the *hcfa* program.

5. Use *srs* to Find Charges By Other Criteria

Have you ever needed to resubmit all claims with a certain procedure, place of service, or for accounts with a specific status flag? Use **maketags**'s Smart Report Suite (*srs*) features to create custom restrictions specifying which charges you would like to rebatch.

Important: When you choose to restrict **maketags** with **srs**, all of the criteria you specify on the main screen of **maketags** will be ignored. You will instead assign your restrictions manually within **srs**.

Follow the steps below to use **srs** to search for and process claims needing to be resubmitted:

Custom Claim Rebatching Using **srs**

1. Press [**F5** -- *Restrict with SRS*] on the main screen of **maketags**.
2. Enter a transaction date range within which **srs** should search for charges to resubmit. Press [**F1** -- *Generate Report*] to continue.

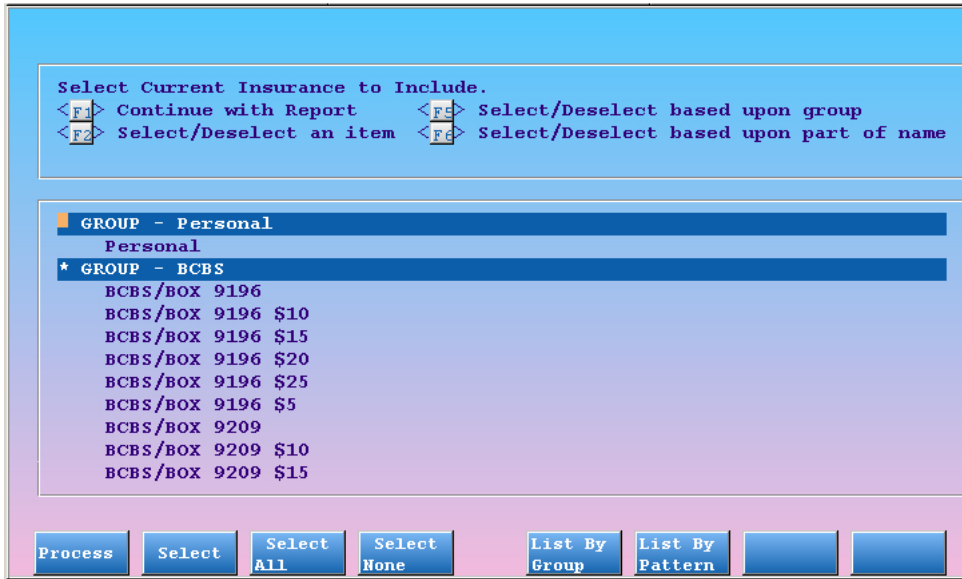
The screenshot shows a terminal window titled "Maketags". The text on the screen reads: "Date Range: from 06/24/04 to 06/23/05" and "Include items using Transaction Date." At the bottom of the window, there is a row of buttons. The first button is labeled "Generate Report" and the last button is labeled "Restore Criteria".

3. The next screen will ask you to specify a "Charge Amount Due" range. The default shown above will include only *due* charges (those with at least a penny due). Enter any amount range and press [**F1** -- *Process*].

The screenshot shows a terminal window titled "Charge Amount Due selection." The text on the screen reads: "Range is between \$ 0.01 and \$9999999.00 ." At the bottom of the window, there is a row of buttons. The first button is labeled "Process" and the last button is labeled "Restore Criteria".

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- Next, specify the insurance plans for which **maketags** will rebatch claims.

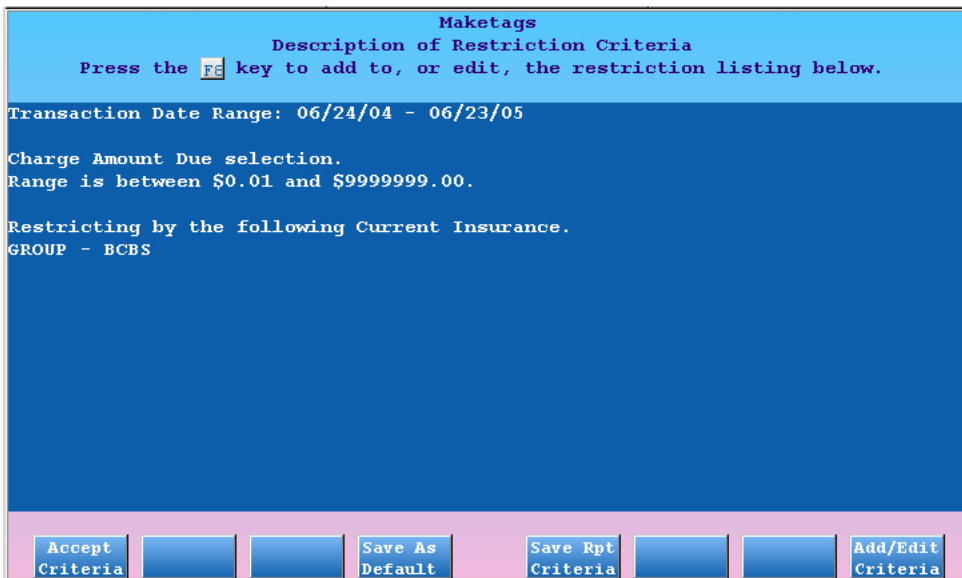


Press [F2 -- Select] to select individual plans, press [F5 -- List By Group] to quickly select an entire insurance company, or select by the pattern of your choice using [F6 -- List By Pattern]. Press [F3 -- Select All] to include all insurances and all personal charges.

Caution

Do not select the "Personal" insurance on this screen unless you want all personal charges to be rebatched for submission!

- Finally, review your chosen criteria and specify whether or not you would like to add any other restriction criteria.



If you wish to add more restrictions, such as a procedure or a place of service, press [F8 -- Add/Edit Criteria].

Otherwise, skip to step 8 below.

- If you chose to add criteria, **srs** will ask you for the restriction criteria you would like to use. Add as many criteria as you wish. You can use the asterisk (*) symbol to view a list of available criteria.

In the above example, Provider, Procedure, and Place of Service (in addition to the default "Amount Due Per Charge" and "Current Insurance") have been added. Press [F1 -- Accept Criteria] to continue.

- For every criteria you added to the list, **srs** will ask you for specific details. Select your criteria from each screen and press [F1 -- Accept Criteria] to continue. The "CHARGE Amount Due" and "CHARGE Current Insurance" criteria were already selected and processed. You do not have to fill them out again.

In the example above, the user has selected a follow-up hospital procedure group for the "CHARGE Procedure" criteria. Only claims with one of the three codes listed in that group will be collected for rebatching.

- Once you have added all of your restrictions, press [F1 -- Accept Criteria] to accept your criteria. **maketags** will

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gather the charges to rebatch based on the criteria you specified.

Save Frequently Used Criteria: As with other **srs** reports, **maketags** criteria can be saved and reused. If you commonly rebatch claims for one particular insurance or procedure, for example, you may want to save the detailed report criteria you entered and restore it the next time you need to resubmit claims. After entering your criteria the first time, press [F5 -- *Save Rpt Criteria*] on the summary screen. When you next need that same criteria, press [F8 -- *Restore Criteria*] from the first **srs** criteria screen.

To learn more about **srs**, read *The Smart Report Suite (srs)* (<http://learn.pcc.com/srs/>).

6. Conclusion: Making Re-billing Easier For You

maketags is not a program your billing department will need every day, but when you need to resubmit a large number of claims it can gather them for you quickly and easily. Contact PCC support at 800-722-1082 or <support@pcc.com> if you have any questions about this or any other Partner program.