·ind Claim Follow-Ups

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ollow the steps below to find Claim Follow-Ups.

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or **Load a Search Filter.**
3. **Follow- Up Options**
    1. Use the **Claim Status** drop-down menu to only include claims with the specified status in your search.
    2. Use the **Filter search by:** options to search the Follow Up Date and the date of Service by:
        1. **Date:** Use this option to search by a date or date range.
        2. **# of days:** Use this option to search by # of days since (equals, less than, greater than, between, any).
    3. Use the **Follow-Up Date** option to only include claims within the specified follow up date range.
    4. Use the **Date of Service** option to only include claims within the specified date of service range.
    5. Use the **Filter Billed Insurance by:**
        1. **Last Billed**: Use this option to only include claims last billed within the specified date range or # of days.
        2. **First Billed**: Use this option to only include claims first billed within the specified date range or # of days.
        3. **Date**: Use this option to filter last billed insurance by date or date range.
        4. **# of days**: Use this option to filter the last billed insurance by the number of days.
    6. Use the **Last Billed Ins Date** option to only include claims within the specified date range.
    7. Use the **Claim Balance** drop-down menu to only include claims within the specified balances in your search.
    8. Use the **Days Since Last Billed Ins** drop-down menu to specify the days since the claim was last billed to the payer you would like to include in your search.
    9. Use the **Claim Type** drop-down menu to only include claims with the specified claim type(s) in your search.
    10. Use the **Current Payer** drop-down menu to only include claims associated with the specified

payer in your search.

    11. Use the **Current Payer Type** drop-down menu to only include claims associated with the specifie payer type in your search.
    12. Use the **Practice** drop-down menu to only include claims associated with the specified practice.
    13. Use the **Provider** drop-down menu to only include claims associated with the specified provider.
    14. Use the **Facility** drop-down menu to only include claims associated with the specified facility.
    15. Use the **Create User** drop-down menu to only include claims created by the specified user.
    16. Use the **Select Claim** field to enter the specific claim number for the claim you are searching for.
    17. Use the **Patient** field to only include claims associated with the specified patient.

4. **Task Options**.
    1. Use the **Task Assigned** drop-down menu to filter claims based on if a task has been assigned to it (e.g. Has Tasks Assigned, No Assigned Tasks, or All).
    2. Use the **Status** drop-down menu to filter claims by the status of the tasks assigned to it (e.g. In Progress, On Hold, Complete, etc.).
    3. Use the **Due Date** option to only include claims with assigned tasks within the specified date range.
    4. Use the **Assigned To** field to filter claims by the user the tasks are assigned to. Enter the usernam or click Select Users and select the user from the list.
5. Click the **Search** button.
6. ***Optional***: Click on the icon to edit your search criteria.

    > Sort your search results. Visit our Reorder Table Columns Help Article for detailed steps on how to hide, rearrange or add header columns.

7. You are able to interact with the search results by right-clicking on a row.
    1. **Copy**: Copies the patient's information to your clipboard.
    2. **Open Claim**: Opens the selected claim in the Claim Section.
    3. **Open Patient**: Opens the selected patient's record within the patient screen.
    4. **Open Payer**: Opens the selected claims payer within the Payers screen.

    5. **Open Provider**: Opens the selected claims provider record within the Providers screen.

8. Click on a line item to open up a specific claim.

9. Click the **Save** button to save any changes made. Or Click the **Close** button to close this selected claim.

10. Click the **Claim Status** button to check the status of this selected claim.

    > ⚠ Depending on the payer, an agreement may need to be filled out prior to checking claim status. Please refer to our Payer Agreements Help Article for more information.

11. Click the Create Task button to create a task associated to this claim. Please refer to our Task Help Article for more information.

12. Click on the Activity button to see the patients activity related to this claim. Please refer to our Manage Account Help Article for more information.

13. Click on the ⋮ More button to open the Claim, Patient, Payer or Provider associated to this clain

14. The **Reference Information window** shows information on the claim, as well as patient, payer and other info related to this claim.

15. The **Add Note** button is used to add a note a follow-up note to this claim.

16. The Icons here are used to:

    1. The copy icon copies the note to other unpaid claims for this patient.

    2. The gear icon is used to configure which users can view this note.

    3. The remove icon removes this note from the claim.

    4. The Undo Icon Undos removing the follow-up note.

       > ⚠ You can only undo this action if you have not saved the claim.

17. The **Expected Payment Info** window is where you can enter payment info related to this claim.

18. The **Patient Notes** window is used to view or add any notes to the patient related to the selected clain