/iew Claim Summary

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ollow the steps below to view a summary of the claim.

1. Select **Claim** > **Claim**.
2. Use the **Search** field to search for your claim.

   Place a check in the ***"Show exact matches only"*** box to search for exact matches or ***"Show unpaid claims only"*** to show claims that may need follow-up.

3. Open the claim.
4. Click the **Claim Summary** tab from the side panel.
5. Review the claim information.
   1. **Patient**: Displays the patient's name, account number, and reference number (when applicable).
   2. **DOB**: Displays the patient's date of birth, age, and gender.
   3. **Form Version**: Displays the claim version (CMS-1500 or CMS-1450 (UB04)).
   4. **Total Amount**: Displays the total billed amount for the procedure codes included on this claim.
   5. **Ins Payments**: Displays any payment(s) a payer has paid towards this claim.
   6. **Pat Payments**: Displays any payment(s) the patient has paid towards the claim (e.g., a copay).
   7. **Adjustments**: Displays any adjustments the payer has made towards this claim.
   8. **Balance**: Displays any open balance remaining after insurance and/or patient payments have been applied towards this claim.
   9. **Patient Credits**: Displays any credit amount available on the patient's account.
   10. **Patient Follow Up Date**: Enter a patient follow-up date.
   11. **Patient Recall Date**: Enter a patient recall date.
   12. **Date of Service**: Displays the date of the service(s) based on the claim's procedure codes.
   13. **Date Entered**: Displays the date this claim was created.
   14. **Last Billed Date**: Displays the last date this claim was submitted to a payer.
   15. **Last Statement**: Displays the last date a statement was sent for this claim.

16. **Statements Mailed Count**: Displays the number of statements mailed for this claim (this option is only available if the Statement Automation Setting to "**Send separate statements for charges pe claim**" is enabled).

17. **Electronic Statement Count**: Displays the number of electronic statements sent for this claim (this option is only available if the Statement Automation Setting to "**Send separate statements for charges per claim**" is enabled).

18. **Follow Up Date**: Enter a follow up date for this claim. Claims with follow up dates can be tracked within the Follow Up Management screen.

    > The Follow up date can be automatically populated on a claim based on the payer the claim was billed to. For more information on defaulting follow up dates per payer reference the General Billing Options Help Article.

19. **Copay Remaining**: Displays the unpaid copay balance for the claim.

6. Click **Save**.