


# More actions for Professional Claims

† Modified on 07/16/2024 9:11 am EDT

## Convert Claim to Institutional

Follow the steps below to convert a professional claim to an institutional 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 **More** button.
5. Select **Convert Claim to Institutional**
6. Click **Save**.

---

## Copy Claim

Once a claim has been saved, you can copy the claim following the steps below.

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 **More** button.

5. Select **Copy Claim**.
6. A copy of the claim will open.
7. Modify the claim information .
8. Click **Save**.

---

## Check Claim Status

Claim Status provides the capability for users to submit status requests and receive responses in real-time regarding their claims. The claim status response provides information about your claim within the payer's adjudication process, including how much is being paid on the claim once approved. Users can retrieve this information within the CollaborateMD application without having to contact the payer. There are no additional fees for this service.


Claim status can be verified for any claim that meets the following criteria:

1. The payer supports electronic Real-Time Claim Status (RTCS).
2. The claim was submitted electronically to the payer.
3. The claim status must be set to "**Claim At Insurance**."

 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.

Follow the steps below to check claim status.

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 **More** button.


5. Select **Check Claim Status**.
6. The Claim Status window will open, informing you of the status of the claim.
7. Click **Close**.

---

## View Charge History

This action allows you to review the audit history of each charge allowing you to know who made a change and when

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 **More** button.
5. Select **View Charge History**.
6. A **Charge History** window will display showing changes made to a procedure code as well as the status of a claim.
7. Click **Close**.


---


## Preview Electronic Claim

The Preview Electronic Claim option will show the 837 ANSI that the system will generate for that claim and can be used to see how your claims will be sent electronically to the payer.

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 **More** button.
  5. Select **Preview Electronic Claim**.
  6. Select the payer the claim is being sent to (if the patient has multiple payers).
  7. Click 
-