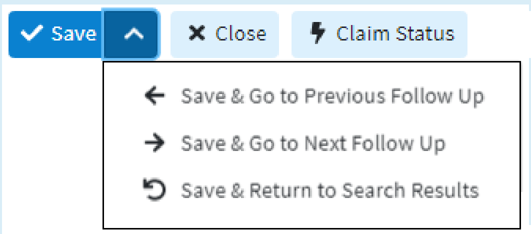
Manage Follow Ups

Last Modified on 07/03/2025 4:25 pm EDT

Change Follow Up Date

Follow the steps below to change the follow up date.

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or Load a **Search Filter**.
3. Click on a line item to open up a specific claim.
4. Click on the **Calendar** Icon and select the new **Follow Up date**.
5. Click **Save**. Otherwise, click the **Close** button.

> Reduce the amount of clicks when saving by using the Save button's drop-down arrow to update this claim and move onto another record or return back to your search results.
>
> 
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Change Charge Status

Follow the steps below to change the claims charge status.

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or Load a **Search Filter**.
3. Click on a line item to open up a specific claim.
4. Click the **Set all charges to** dropdown and select your claim's charge status from your list.

> If no selections are made, the defaulted "NO CHANGE" option will keep the claim's existing

charge status.

5. Click **Save**. Otherwise, click the **Close** button.

Manage Follow Up Notes

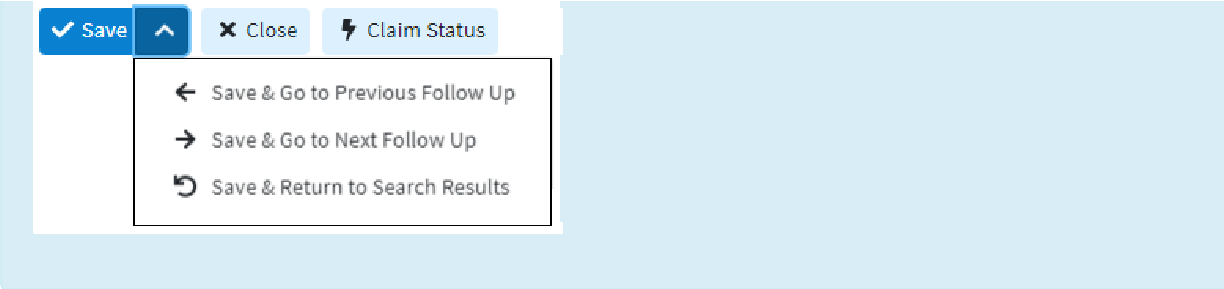
Follow the steps below to manage follow up notes.

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or **Load a Search Filter**.
3. Click on a line item to open up a specific claim.
4. Click the **Add Note** button to add a new text box.
5. Type your note in the text box.
6. Additional options:
    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 Undoes removing the follow-up note.

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

7. Click **Save**. Otherwise, click the **Close** button.

    Reduce the amount of clicks when saving by using the Save button's drop-down arrow to update this claim and move onto another record or return back to your search results.



Set Follow Up Date

You can also add follow-up dates to one or multiple claims in order to boost insurance receivables by checking up on claims at a specific day or date. Follow the steps below to manually add a Follow Up Date to multiple claims at once.

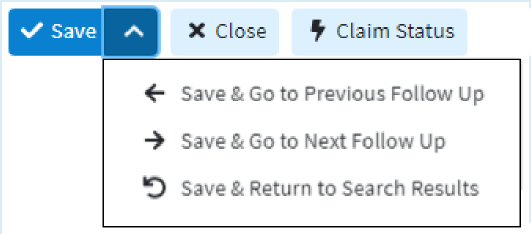
1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or **Load a Search Filter**
3. Check the box next to the claims you wish to update.
4. Click the **Set Follow Up** button
5. Enter the new **Follow Up Date**.
6. Click **Save**.

Enter Patient Notes

Follow the steps below to Enter Patient notes

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or **Load a Search Filter**.
3. Click on a line item to open up a specific claim.
4. Locate and click on the Notes tab from the side-panel.
    1. Use the drop down menu to select the type of note you want to enter.
    2. Click the **Add Note** button to start creating the note.
    3. Click **Done**.

5. Click **Save**. Otherwise, click the **Close** button.

> Reduce the amount of clicks when saving by using the Save button's drop-down arrow to update this claim and move onto another record or return back to your search results.
>
> 
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Manage Tasks for Follow-up Claims

Follow the steps below to change the follow up date.

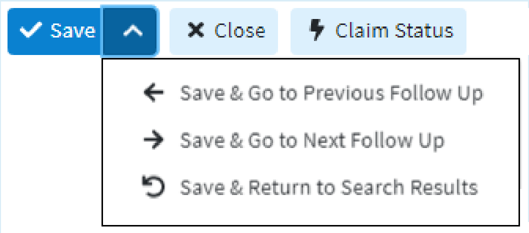
1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or Load a **Search Filter**.
3. Click on a line item to open up a specific claim.
4. Click the **Create Task** button.

> Visit our Tasks Help Artifices for detailed steps on how to add and manage tasks.

   1. Enter your task **Title**.
   2. Set the **Due Date**, **Status** and **Priority**.
   3. Enter the **description** for this task.
   4. Add any **links** to this task.
   5. Select which **user** to assign this task to
   6. Click **Save**

5. Click **Save**. Otherwise, click the **Close** button.

Reduce the amount of clicks when saving by using the Save button's drop-down arrow to update this claim and move onto another record or return back to your search results.

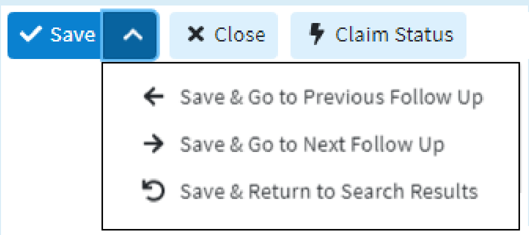


Open Related Records

Follow the steps below to quickly open any related records to this claim.

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or **Load a Search Filter.**
3. Click on a line item to open up a specific claim.
4. Click the More button found at the top of the page.
    1. **Open Claim**: Opens the claim record
    2. **Open Patient**: Opens the patient the claim was sent for.
    3. **Open Payer**: Opens the payer this claim was sent to.
    4. **Open Provider**: Open's the provider that billed this claim
5. Click **Save.** Otherwise, click the **Close** button.

Reduce the amount of clicks when saving by using the Save button's drop-down arrow to update this claim and move onto another record or return back to your search results.

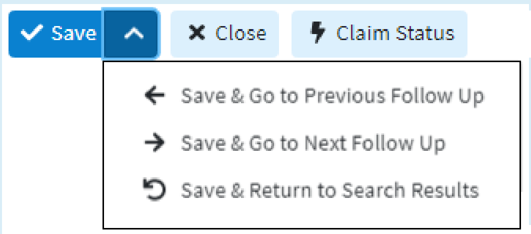


Track Claim Submission History

Need to review all the times this claim has been submitted? Or do you want to verify which payers this claim was sent to? Quickly track the claim's submission history from within the claim following up section.

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or Load a **Search Filter**.
3. Click on a line item to open up a specific claim.
4. Click the ⋮ More button found at the top of the page.
5. Select **Track Claim Submission History**.
6. The claim will be opened in the Claim Tracker screen.

Reduce the amount of clicks when saving by using the Save button's drop-down arrow to update this claim and move onto another record or return back to your search results.



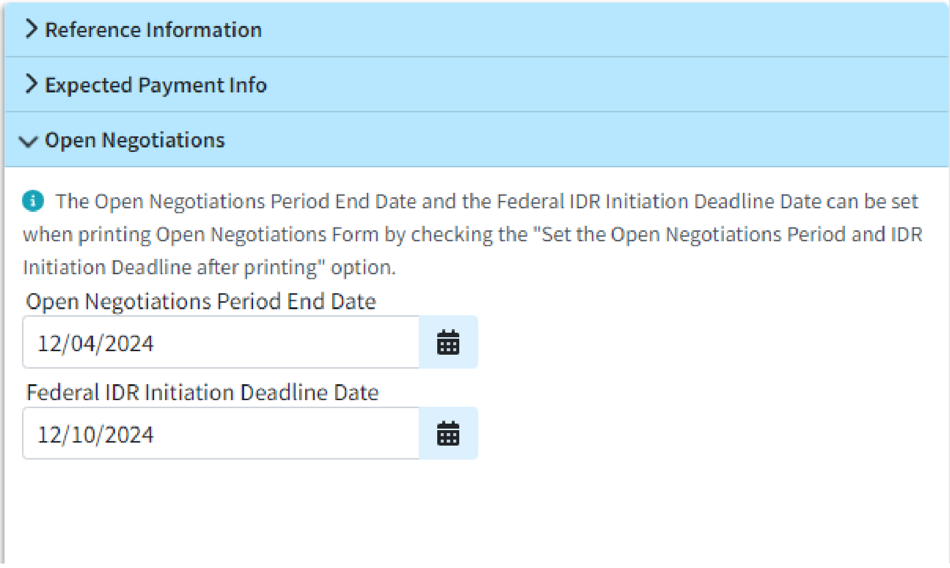
Manage Open Negotiations and Federal IDR Initiation Dates

When negotiating out-of-network rates for emergency services, users print and submit the Open Negotiations Form to the payer. Upon submission, this triggers two important deadlines:

1. The end of the Open Negotiations Period, which occurs 30 business days after the form has been submitted
2. The deadline to initiate the Federal Independent Dispute Resolution (IDR) process, which is 4 busine days after the conclusion of the Open Negotiations Period

These "Dates" are stored within the application to allow users with multiple claims to efficiently manage the Open Negotiations process. The Open Negotiations Period End Date and the Federal IDR Initiation Deadline Date can be set when printing the Open Negotiations Form by checking the "Set the Open Negotiations Period and IDR Initiation Deadline after printing" option. For more information, please reference our Print Open Negotiations Form Help Article

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or **Load a Search Filter**.
3. Click on a line item to open up a specific claim.
4. Locate and click **Open Negotiations** from the right-hand side panel.
5. View the previously set Open Negotiations Period End Date and the Federal IDR Initiation Deadline Date.



6. Click 

View EOB Info From Follow Up

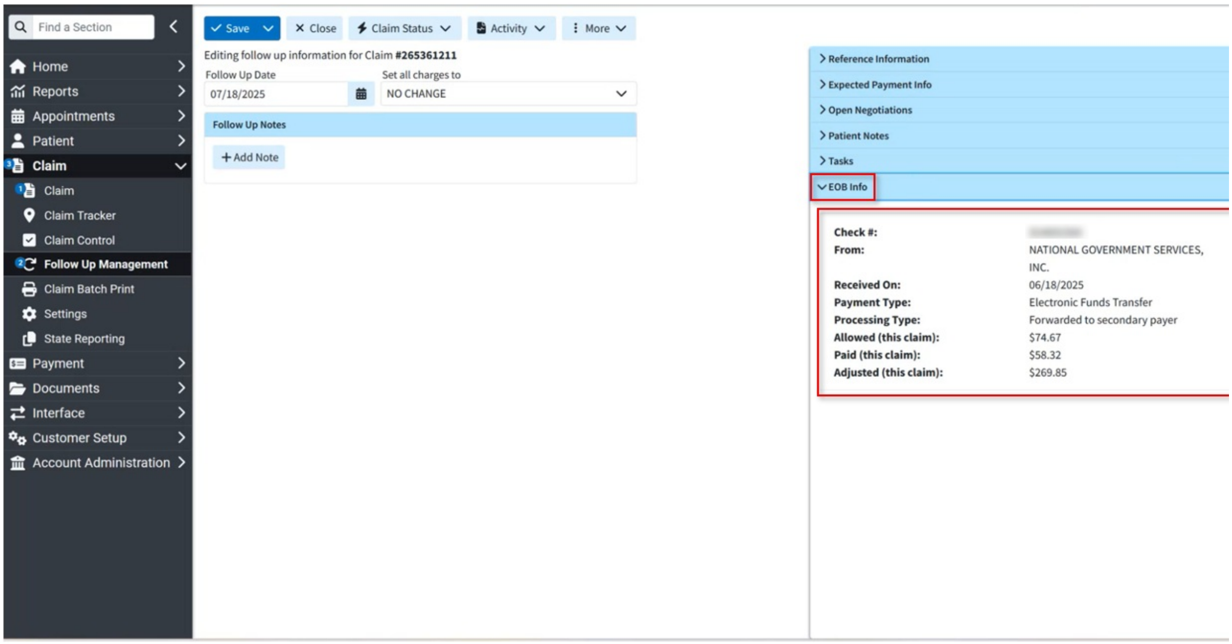
Follow the steps below to view the EOB info from a follow up.

1. Select **Claim** > **Follow Up Management**.
2. Enter your **Search Criteria** or Load a **Search Filter**.

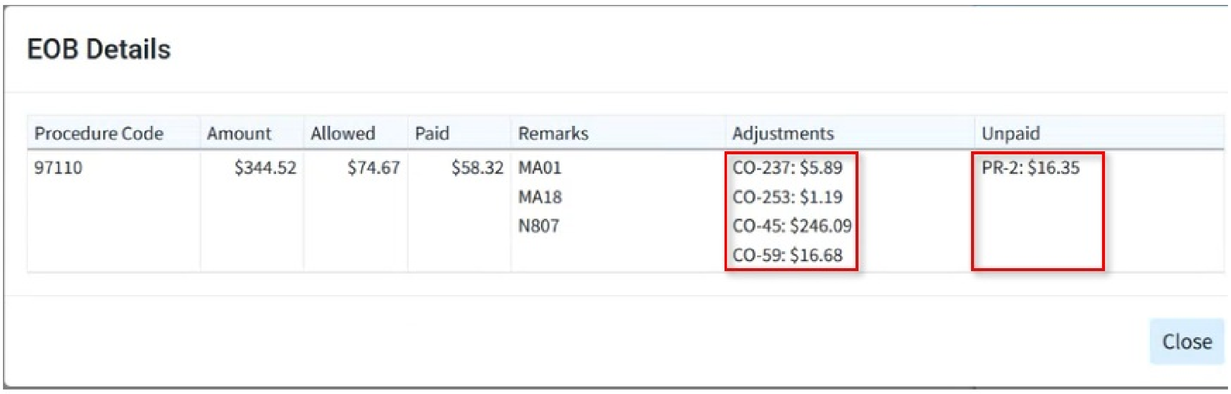
3. Click on a line item to open up a specific claim.

4. Click the **EOB Info** tab from the side panel.

5. View the EOB information (Check#, Payer, Received Date, Payment Type, Processing Type, Allowed Amount, Paid Amount, And Adjusted Amount).



6. To view the EOB details, click the desired check information to open the EOB details window.



EOB Details

Procedure Code	Amount	Allowed	Paid	Remarks	Adjustments	Unpaid
97110	$344.52	$74.67	$58.32	MA01 MA18 N807	CO-237: $5.89 CO-253: $1.19 CO-45: $246.09 CO-59: $16.68	PR-2: $16.35

Close

Hovering over the adjustment codes provides their descriptions; hovering over the unpaid reason codes provides any denial reasons.

7. When finished, click **Close**.