Claim Control Task Options

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ollaborateMD's **Task Options** feature allows users to create specific tasks associated with your claims in laim control. Tasks will help you keep track of items that needs to be completed for multiple claims at once hese tasks can have due dates, links, descriptions, statuses, and priorities, and can be assigned to yourself specific users within your business, or to groups.

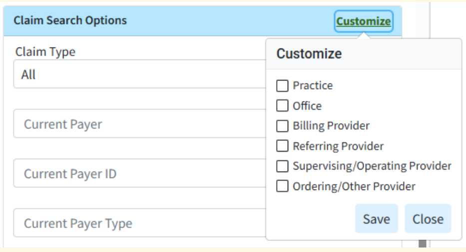
ollow the steps below to create a task from Claim Control.

1. Select **Claim** > **Claim Control**.
2. Enter your **Search Criteria** or **Load** a Search Filter.
    1. Use the **Claim Status** drop-down menu to filter by the status of the claim (e.g., Send to insurance via clearinghouse, Balance due patient, User print and mail to insurance, etc.)
    2. Place a check in the "**Include Deleted**" box to include deleted statuses in your search results.
    3. Use the **Entered Date** field to filter the search by the date the claim was entered into CollaborateMD.
    4. Use the **Date of Service** field to filter the search by the date of service on the claim.
    5. Use the **Last Submitted Date** field to filter the search by the date the claim was last submitted.
    6. Use the **Review Status** drop-down menu to filter the search by the review status of the claim (e.g Unreviewed, Reviewed - Error, etc.).
    7. Use the **Claim Type** drop-down menu to filter the search by Professional, Institutional, or All claims.
    8. Use the **Current Payer** drop-down menu to filter the search by the payer on the claim.
    9. Use the **Current Payer ID** field to filter the search by the Payer ID.
    10. Use the **Current Payer Type** drop-down menu to filter the search by the payer type (e.g., Self-Pay Medicare, BCBS, etc.).

        You are able to select multiple payer types at once.

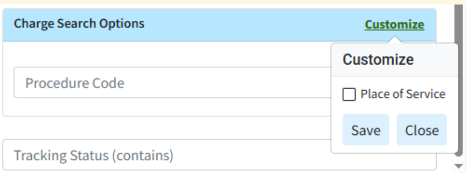
    11. Use the **Patient field** to filter the search by the exact patient the claim is associated with.
    12. Use the **Rendering Provider** field to filter the search by the rendering provider on the claim.
    13. Use the **Facilities** field to filter the search by the facility on the claim.

14. Use the **Procedure Code** field to filter the search by procedure code on the claim. **Note: You can only search by one procedure code at a time**.

> ⚠ You can use the **Customize** link to add Practice, Office, Billing Provider, Referring Provider, Supervising/Operating Provider, and Ordering /Other Provider to your Claim Search Options. To do this, check the corresponding box(es) and click the **Save** button.
>
> 
>

15. Use the **Procedure Code** field (Under Charge Search Options) to filter the search by procedure code/charge on the claim.

16. Populate the **Tracking Status (contains) field** to filter the search by keywords in the status message sent back by the payer.

> ⚠ You can use the **Customize** link to add Place of Service to your Charge Search Options. To do this, check the corresponding box and click the **Save** button.
>
> 
>

3. Click the **Search** button.

4. ***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.

5. Place a check in the box(es) next to the claim(s) you want to include in the task.

6. Click the **Task Options** button.

7. Select **Create Task**.

8. Enter the task name in the **Task Title** field.

9. Add the task's **Due Date, Status,** and **Priority**.

10. Write in the **Description** of the task.

> ⚠ The task will automatically be linked to the selected claims within the task links.

11. ***Optional***: Click the **Add Link** to link the task to an additional action. Tasks can be linked to a **patient, claim, practice, provider, facility, payer, report, message, or customer**.

12. Enter the username you would like to assign this task to. Or click Select Users and select the user or group from the list.

> Only users with the **Administer All** permission under administer tasks can edit tasks for other users.

8. Click **Save**.

> For more information on Tasks, please visit the **Tasks Help Article**.