

# How to Submit a Claim to an Insurance Company

09/16/2024 3:44 pm EDT

You can submit claims from two different screens.

Follow the steps outlined below to submit the claim from the Live Claims Feed screen:

1. Hover the cursor on **Billing** and select **Live Claims Feed**.
2. Enter the Patients name or Chart ID and click on **Update Filter**.
3. Select the date of service and it will direct you to the Billing Detail screen.

Choose the appropriate billing status out of the five (5) mentioned below and click **Verify & Save** to submit the claim to the respective insurance.

**Bill Insurance:** To submit the claim to the patient's primary medical insurance.

**Bill Secondary Insurance:** To submit the claim to the patient's secondary medical insurance.

**Auto Accident Claim:** To submit the claim to the patient's Auto insurance.

**Worker's Comp Claim:** To submit the claim to the patient's Workers' Compensation insurance.

**Durable Medical Equipment Claim:** To submit the claim to the patient's Durable Medical Equipment insurance.

Jenny (Jen) Harris – 05/11/2020 Telehealth [02] – Exam 1		View Service	+ EOB	SuperBill	Clinical Note	Clone	HCFA/1500	HCFA/1500 (text)	Print Screen
<b>Billing Status</b>	Bill Insurance	<b>Claim Type</b>		Default					
<b>ICD Version</b>	ICD-10	<b>Emergency Service</b>		No					
<b>Primary Insurer</b>	- Default -	<b>Delay Reason</b>		- Not Used -					
<b>Secondary Insurer</b>	- Default -	<b>Acute Manifestation Date</b>		07/06/2020					
<b>Pt Payment</b>	\$ 0 Copay: \$20.00 +	<b>Onset Date</b>		431: Onse		(HCFA box 14)			
<b>Payment Profile</b>	Insurance	<b>Other Date</b>		- Other Da		(HCFA box 15 & 19)			
<b>Pt Payment Due</b>		<b>Is patient's condition related to</b>							

*All patient data listed in this article is sample data. This is not a real person or real patient data.*

Follow the steps outlined below to submit the claim from your schedule:

1. Hover the cursor on **Schedule** and select **Calendar**.

2. Click on the appointment that you would like to bill out to the insurance company.
3. In the **Schedule Appointment** screen, click on the **Billing** tab and choose one of the billing statuses mentioned below and select **Verify & Save** to submit the claim to the respective insurance.

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**Bill Secondary Insurance:** To submit the claim to the patient's secondary medical insurance.

**Auto Accident Claim:** To submit the claim to the patient's Auto insurance.

**Worker's Comp Claim:** To submit the claim to the patient's Workers' compensation insurance.

**Durable Medical Equipment Claim:** To submit the claim to the patient's Durable Medical Equipment insurance.

**Schedule Appointment**

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Patient SuperBill Clinical Note Billing Details Other Forms

**Billing Status** [Dropdown]

ICD Version ICD-10 [Dropdown]

Primary Insurer - Default - [Dropdown]

Secondary Insurer - Default - [Dropdown]

Patient Payment \$ 0 Copay: \$20 +

Pre Authorization Approval [Text]

Referral # [Text]

Payment Profile Insurance [Dropdown]

Billing Profile [Dropdown] +

Billing Pick List Choose Codes from Pick List

Diagnosis Pick List Choose Codes from Pt Problems

**HCFA Box 10 - Is patient's condition related to:**

Employment No [Dropdown]

Auto Accident No [Dropdown]

Other Accident No [Dropdown]

Onset Date Type Onset of Current Symptoms o [Dropdown]

Onset Date 07/10/2020 [Text]

Other Date Type - Other Date Type - [Dropdown]

Other Date [Text]

Claims are batched and submitted to the clearinghouse, each day of the week, including weekends and holidays.

**Note:** If you have already submitted your claim through the payer's portal, sites such as Availity or NaviNet, or from a previous system, you do not need to resubmit the claims through DrChrono. However, you do need to create appointments in order to post payments or have ERA payments post automatically.