

# How to Submit a Claim to an Insurance Company

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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 Patient's name or Chart ID and select **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 press **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.

Tina Adams – 11/18/2024 Primary Office [11] – Exam 1		View Service	+ EOB	SuperBill	Clinical Note	Clone	HCFA/1500	HCFA/1500 (text)	Print Screen
Institutional Claim	<input type="radio"/> No	Claim Type	Default						
→ Billing Status	Bill Insurance	Emergency Service	No						
ICD Version	ICD-10	Delay Reason	- Not Used -						
Primary Insurer	- Default -	Acute Manifestation Date							
Secondary Insurer	- Default -	Onset Date	431: Onse		(HCFA box 14)				
		Other Date	- Other Da		(HCFA box 15 & 19)				

*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. Select the appointment that you would like to bill to the insurance company.
3. In the **Schedule Appointment** screen, select 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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**Schedule Appointment**

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

Institutional Claim

Patient SuperBill | Clinical Note | Billing Details | Other Forms

**Billing Status:** Bill Insurance

**ICD Version:** ICD-10

**Primary Insurer:** - Default -

**Secondary Insurer:** - Default -

**Patient Payment:** \$ 0 Copay: \$20

**Pre Authorization Approval:**

**Referral #:**

**Payment Profile:** Insurance

**Billing Profile:**

**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

**Auto Accident:** No

**Other Accident:** No

**Onset Date Type:** Onset of Current Symptoms

**Onset Date:**

**Other Date Type:** - Other Date Type -

**Other Date:**

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.